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ABSTRACT

The current status of British policy and practice related to work-life balance was examined through case studies of six organizations identified as having well-developed work-life balance and flexible working practices. Interviews were conducted with human resource (HR) managers at all six organizations, and interviews and focus group discussions were conducted with line managers and employees at four of the organizations. Short self-completion questionnaires were administered to all participants. Of the 88 questionnaires completed, approximately two-thirds came from 1 organization. Many employees reported clearly benefiting from the flexible policies/practices offered by their organization. HR managers also generally believed that such policies/practices yielded tangible business benefits, including improved employee morale, greater employee commitment and performance, and reduced casual absence and turnover. Employers reported that, although they had made significant efforts to introduce flexible working practices, take-up among their staff had thus far been relatively low. The following factors were identified as preventing greater take-up of flexible working policies: perceived negative impact on career prospects; incompatible organizational cultures; lack of knowledge of available options; and negative impact on earnings. The study documented a need for greater support and guidance to help employees and line managers take advantage of available flexible work practices and handle unexpected problems. (Contains 25 references.) (MN)

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the Institute for Employment Studies

Work-Life Balance: Beyond the Rhetoric

J Kodz
H Harper
S Dench

Report 384

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Executive Summary

Demographic changes, a more diverse workforce, business imperatives and government policy have been driving work-life balance up the agenda. There appears to be an increasing concern amongst employees that their work should leave them with the time and energy to pursue interests and responsibilities outside work. Individuals with childcare and eldercare responsibilities, clearly have particular needs. Nonetheless, many employers now recognise that options to work flexibly should be available to all employees, not just those with caring responsibilities. Examples and case studies of good practice abound. Employers compete keenly to be recognised as an 'employer of choice' and for work-life balance awards.

Yet do these practices make a tangible difference to the lives of employees and their families? How well do employee experiences match with the espoused aims of policy and practice? A key concern must be that any serious under-delivery of the expected business benefits of these policies and practices will mean an erosion among employers of any incentive to maintain them as labour market conditions become looser. It was these issues that this IES Research Networks supported study set out to address.

The research was based on qualitative interviews and focus groups undertaken within six organisations with well-developed work-life balance and flexible working practices. At each employer, interviews were conducted with an HR manager. In four of the organisations one to one or focus group discussions also took place with line managers and other employees. A small questionnaire survey of employees was also carried out.

These organisations were selected because they had well developed work-life balance and flexible working practices. They offered a comprehensive range of flexibilities, for example: career

breaks, extended maternity and paternity leave, adoption leave, paid dependency leave, compressed weeks, job share, and leave for community and volunteer work. They also recognised that the successful implementation of work-life balance practices required a change in culture and attitudes within the organisation.

Many success stories were recounted of individuals who had clearly benefited from such flexibilities. Using indices such as employee morale, commitment and performance, and reduced casual absence and turnover, HR managers were also generally convinced of their business benefits. This however, was only a part of the story.

Employers reported that although they had made significant efforts to introduce flexible working practices, take-up amongst their staff had so far been relatively low. Latent demand appeared to be high. That is, a sizeable proportion of all the workforces we studied felt unable to take up work-life balance options. As such, there appears to be a work-life balance 'take-up gap'. This was in spite of the initiatives desired by employees having been made available.

Despite the efforts the employer had made, a number of factors put off individuals from taking up flexibilities which might improve their work-life balance.

- Perceived impact on career prospects was the main concern, as well as:
- incompatible organisational cultures, such as an entrenched long hours culture and unsupportive attitudes and behaviours of senior managers, line managers and colleagues.
- Heavy workloads can make it difficult to see how an alternative way of working would work.
- Individuals often lacked knowledge of what is available and feasible, especially when the employer relies on the creativity of the individual to identify solutions for themselves.
- The infrastructure and technology not being in place which would support the uptake of such initiatives as working from home.
- The impact on earnings was also a key concern. Many flexible working practices result in a reduction in pay (for example part time work or career breaks) which low paid employees in particular, simply cannot afford.

Difficulties are not confined to the individual taking up the work-life balance option. Line managers also experience difficulties when their subordinates take up work-life balance options.

- Managers would like guidance and support to help them:
  - decide who has access to which options, and to be fair to all they manage as they do so. This is a particular issue for managers of support staff (including IT, administration, reception) whose access to work-life balance options is more restricted than other groups.
  - deliver workloads with reduced or differently organised resources.

For work-life balance to work effectively, individuals need to be supported to get over some of these barriers, through for instance effective internal communication and easily accessible information about the practices on offer and a change in the organisational culture, so that new ways of working become the norm. They also need support with some of the difficulties they might encounter when taking up such policies: trying to fit in a full-time workload into a part-time working week, backlash from colleagues, and a perception that they are not fully committed employees. Employees often need support and guidance on how to make a new way of working, such as job sharing or working from home, a success and how to deal with unexpected problems. It is also clearly important that line managers are supported. They may know the appropriate work-load for a full-time member of their team, but judging a suitable workload and managing individuals working in different ways presents new challenges.

1. Introduction

1.1 What is work-life balance?

The principle at stake here says that there should be a balance between an individual's work and their life outside work, and that this balance should be healthy. At the very least, the balance should not be unhealthy. In today's highly pressurised workplaces, this is a concern for all those in work. Among employees, those with caring responsibilities clearly have particular needs. More broadly, there is increasing acceptance that choice, control and flexibility are important *in work*, that personal fulfilment is important *outside work* and, further, that satisfaction *outside work may enhance employees' contributions to work*.

Policy-makers, employers, trade unions and employees continue to debate the merits of work-life balance initiatives. They do so for many reasons: their concern for economic and/or labour market efficiency, their sense of corporate social responsibility and/or duty of care and their interests in collective bargaining and healthier working. Demographic changes, a more diverse workforce, government policy, a tight labour market and business imperatives have been driving work-life balance up the agenda. At the same time, customers increasingly expect access to services outside traditional working hours, and for businesses, improvements to competitiveness and flexibility are paramount.

We were interested in what this is meaning in practice. There is evidence to suggest that employment and management practices are changing. Examples of 'good practice' abound, with employers increasingly offering flexible working options to their employees, and employers compete keenly for 'work-life balance'

awards. In spite of this, it is unclear how closely work experiences match work-life balance policy statements and values within organisations. Furthermore, as the economy enters a downturn, will work-life balance issues remain so high on the agenda? This study examines the extent to which recent work-life balance rhetoric is, in fact, a reality for organisations, managers and employees.

1.2 The research

This research was funded by the IES Research Networks, through which a group of IES corporate members finance, and often participate in, applied research on employment issues. These employers were interested in the current status of work-life policy and practice.

The focus of the research was therefore upon the experiences of line managers and individual employees in relation to work-life balance policy and practice. Key research questions were:

- Has employees' commitment to their employer increased as a result of work-life policies? How is this manifested?
- What factors have affected employees' disposition/ability to take full advantage of such policies? Do they experience guilt at making use of any of these policies? What effect does this have?
- Have employees experienced 'backlash' from colleagues based on their use of these policies? How has this manifested itself, and what are the effects?
- Has access to work-life policies affected their perceived ability to cope with role conflict, role overload, role ambiguity and other 'stressors'?
- What effects have these policies had on their work performance, productivity, attendance and loyalty to their employer?
- How well do they believe that work-life policies and practices have embedded in the culture of the organisation? How is this manifested (working hours, access to career development/ promotion opportunities, requirement to be geographically mobile)?
- How closely aligned is managerial behaviour with the organisation's espoused policy and values regarding work-life balance?

Within the context of these key questions, the research also sought to explore:

- What is the nature and level of demand for work-life balance and flexible working options amongst employees?
- What is being offered by employers in terms of work-life balance initiatives?
- How have these initiatives been introduced and implemented within organisations?

1.3 Research methods

The research was based on in-depth qualitative research in six case study organisations. Organisations were specifically selected which had well-developed work-life balance policies and flexible working practices. This was in order to examine how well work-life balance rhetoric matched employee experiences in such organisations. For instance, some had previously been cited as case studies of good practice and some are members of *Employers for Work-life Balance*. This is an alliance of business leaders who believe the introduction of work-life policies has benefited their organisation. Not only did these organisations offer a comprehensive range of flexibilities, for example: career breaks, extended maternity and paternity leave, adoption leave, paid dependency leave, compressed weeks, job share, leave for community and volunteer work, they also recognised that the successful implementation of work-life balance practices required a change in culture and attitudes within the organisation.

The industrial sectors of these case study organisations encompassed manufacturing, retail, professional services, and public administration. All except one were large employers, *ie* employed more than 500 employees. Within these organisations a series of interviews were conducted, which we detail below.

1.3.1 Interviews with human resource managers

Within all of the six participating organisations, interviews were conducted with a human resource manager. This interview focused upon the following areas:

- the manager's assessment of the needs and wishes of employees in terms of work-life balance
- work-life balance initiatives and flexible working practices offered by the employer
- the implementation and take-up of these policies and practices, and
- the perceived success and benefits of such initiatives.

1.3.2 Research conducted with line managers and employees

Within four of the organisations, interviews were also conducted with line managers and employees. In three of these, the research took the form of a series of focus groups, whereby separate group discussions were conducted with line managers and other employees. In one organisation, however, it was difficult to release a group of staff at any one given time. Therefore, in this case a series of one to one interviews were undertaken with line managers and staff. The number of research participants within each organisation ranged between ten and 50. The participants were selected to reflect a range of employees and managers in terms of their job role, their work-life balance needs and wishes (as far as was known in advance of the interview) and their take-up of flexible working practices.

Interviews were conducted with line managers because of their key role in communicating and implementing work-life balance policies and practices within organisations. These interviews and focus group discussions explored:

- the managers' assessment of the needs and wishes of the employees within their teams, in relation to work-life balance issues
- their knowledge and understanding of their employer's approach to work-life balance, and the work-life balance policies and practices offered within the organisation
- the level and nature of take-up of flexible working practices within the team, and
- their views of these work-life balance policies and practices, their role and experience of the implementation, and any support they have received with regard to introducing work-life balance initiatives.

As noted above, the employee research participants were selected to represent a range of staff within organisations. Some of these interviewees were also managers. However, the focus of these interviews and group discussions was upon the work-life balance needs and experiences of the individuals themselves, rather than within the teams they manage. The topics explored were:

- current working patterns
- work-life balance needs and wishes, and their satisfaction with the present balance between work and life outside
- their knowledge and understanding of their employer's approach to work-life balance and the work-life balance policies and practices offered within the organisation
- their views of and satisfaction with the employer's approach to work-life balance and how any work-life balance initiatives had been communicated to them
- experiences of taking up flexible working options, reactions and support from managers and co-workers
- any concerns or obstacles encountered which have prevented individuals from taking up flexible working options, which might improve their work-life balance, and
- the benefits and disadvantages of the work-life balance policies and practices within the organisation.

Questionnaire survey

In order to ensure that consistent information was collected from all research participants, a short self-completion questionnaire was also used. This was distributed at the end of the focus group discussion or interview. This collected information on working patterns, responsibilities and activities outside work, take-up of work-life practices and flexible working options and views about the balance between work and life outside.

While a total of 88 questionnaires were returned, approximately two-thirds of these came from one organisation. Due to the small size of the sample and the bias towards this organisation, this data has been analysed and referred to in this report with caution.

Previous research and commentaries

This report is based primarily on our own research findings. To provide context to the findings, it also draws upon other recent studies and commentaries. One report referred to in particular is a recent national survey of work-life balance (*Work-Life Balance 2000*, Hogarth *et al.*, 2001). This research was conducted for the Department for Education and Employment and based on representative sample surveys of 2,500 workplaces and over 7,500 employees. This research was particularly useful in order to quantify and provide context to some of our own qualitative research findings.

1.4 Report structure

The report is structured as follows.

- Chapter 2 reports on the level and type of demand for work-life balance options which we observed in the participating organisations, and sets this in the context of drivers for work-life balance initiatives.
- Chapter 3 reports on what employers are offering, and to whom. It also details employers' attitudes to work-life balance.
- Chapter 4 examines the level of take-up of flexible working options within participating organisations. It also reports on the benefits that are resulting from take-up of the available options; business benefits and benefits for the individual are differentiated.
- Chapter 5 reviews the obstacles individual employees encounter as they take up, and as they consider whether to take up, work-life balance options.
- Chapter 6 focuses on their line managers and co-workers and examines whether and what difficulties they experience.
- Chapter 7 reviews the main findings and the issues arising from the research findings. It suggests ways in which barriers to take-up of work-life balance options might be addressed and how benefits might be maximised.

2. Demand for Work-life Balance

In this chapter we explore the reasons behind the increasing interest in, and demand for, work-life balance. There are clearly a number of factors which have led to this increased promotion of work-life balance in recent years. First, the demographic and business imperatives and government policy contexts are considered. We also present details of what is understood by 'work-life balance'. In the second section of the chapter, findings from this research are discussed in relation to the needs and wishes expressed by employees at the organisations surveyed. The nature and level of demand is outlined and set within the context of other national surveys which have examined the latent demand for work-life balance practices and flexibilities at work.

2.1 Why is work-life balance so important?

Reconciling work and family life has been an issue of growing importance over the past decade, and the phrase 'family-friendly employment' has become commonly understood. Many aspects of this relationship have been seen as a matter for private negotiation between employees and their employers. The right of most women to take time off around childbirth is one exception to this. However, in recent years government has played a greater role in promoting employment practices which support working parents. They have also broadened the agenda, through the launch of a work-life campaign in 2000. This, while recognising that carers have particular needs in relation to balancing work and domestic responsibilities, emphasises that everyone has interests and responsibilities outside work and needs opportunities to balance their working and non-working lives.

There are many factors leading to the promotion of work-life balance. These can broadly be divided into three groups: changes in the demographic structure and in participation in the labour market; pressures within businesses; and government policies. These interact, for example demographic changes create pressures on businesses and influence government policy.

Demographic changes and labour force participation

Demographic changes are well documented and here we summarise some key themes. Unless otherwise stated, these data are drawn from the Labour Force Survey (LFS). Increasing participation of women in the labour market has been a key factor in the promotion of policies which aim to support employees combining work and domestic responsibilities. In 1995, 66 per cent of women were in paid employment, by 2000 this figure had increased to 69 per cent. In 1971, 37 per cent of employees were women. This figure now stands at approximately 50 per cent. There are a number of reasons for increased female participation in the labour market, including:

- later marriage and childbirth
- quicker return to work after childbearing. In 1988, 45 per cent of women who had worked during pregnancy returned to employment within nine months of their baby's birth. In 1996, two-thirds had returned to work (Callender *et al.*, 1997).
- higher qualification levels among women
- increased availability of a range of flexible working patterns
- structural changes in industry, for example, the decline in male dominated manual manufacturing jobs and growth of service sector, female dominated employment
- social pressures for greater equality in opportunity between men and women
- related to the above, changing attitudes towards whether women should work. The British Social Attitudes Survey shows how attitudes to women working have changed over the past decade. Although views are about equally divided as to whether women with pre-school children should work, once children start school there are widespread beliefs that women should work, particularly part-time (Jarvis *et al.*, 2000).

One consequence of this increased proportion of women in the workforce is that many more employees have domestic and caring responsibilities. To attract and retain these female employees, employers have started to pay greater attention to their needs, for example, in terms of working patterns and taking time off for emergencies. Indeed, at times of severe recruitment difficulty in the economy generally, emphasis has been placed on the necessity of employment practices which will be attractive to 'women returners'. The increasing proportion of lone parents, particularly mothers, also focuses attention on practices which enable them to combine work and caring responsibilities.

There is also increasing recognition that male employees have domestic and caring responsibilities. Analyses have shown that fathers work longer hours than men who are not fathers (Brannen *et al.*, 1997). Although the division of domestic responsibilities remains unequal (Jowell *et al.*, 1998), there is greater emphasis on the role of fathers. Men want to participate in their children's upbringing and childhood (Brughes *et al.*, 1997; Kodz *et al.*, 1998; Warin *et al.*, 1999). Furthermore, as more mothers work, there has to be a greater emphasis on sharing responsibilities. In some of the case studies conducted for this study, men reported that the only way they and their partner could both work was to share responsibilities. Occasionally, for example, where the wife's employer was less flexible, the father had to take main responsibility for childcare during working hours.

The ageing of the population is another important factor. It is predicted that between 1976 and 2011, the population aged 16 and over in Great Britain will have increased by around 15 per cent. The overall effect of these changes is that, over the 35 year period, the 45 to 64 year old age group will have grown from 31 per cent to 34 per cent of the population. The youngest group (16 to 24) will have fallen from 17 per cent to 14 per cent. The ageing of the population during this period hardly affects the oldest (65+) age groups. Dramatic changes in the number and share of the population in these groups will not emerge until at least a decade later. Life expectancy for men has risen from 58 in 1940 to 74 in 1995 and, for women from 63 to 80 over the same period. This is expected to continue to rise to 79 for men and 84 for women by the middle of this century.

This ageing has a number of implications. Although one reason for long life expectancy is improved health, as people live longer

a greater proportion experience various illnesses related to age and need support and care. A greater proportion of employees will have some sort of caring responsibilities for old and infirm relatives, and need flexible working practices to cope with these. This has not yet become a major issue but is growing. Dramatic changes in the size of the elderly population are not expected until 2010/2020. In future decades, a far higher proportion of those in employment than currently will have elderly relatives who are in some way dependent on them.

Another implication of an ageing population, and the associated decline in young and middle aged people is that many employers will have to rethink their attitudes to age. The greatest growth in labour market participation recently has been amongst older women. Employers who discriminate against potential employees on grounds of age will find it increasingly difficult to staff an operation. This creates further pressures for work-life balance practices. These people may no longer have childcare responsibilities but may have dependent older relatives. Furthermore, although many older people need to work for financial reasons, trends towards early retirement are unlikely to be easily reversed. Older employees may not want to work full-time as they approach retirement, or may want more general flexibility in their working hours.

Business pressures

By no means all employers offer access to flexible working practices or time off to deal with domestic and other responsibilities and emergencies. Nevertheless, a range of factors are leading to more employers paying attention to these issues. Legislation, and the demands of employees, are two causes. For example, the introduction of parental leave, emergency leave and paternity leave all mean that employers are having to pay attention to these issues. Furthermore, especially in areas of low unemployment or where certain skills are in short supply, employers are having to pay attention to the wants and needs of potential recruits. They are often competing with other local, sometimes national, employers and introduce practices which lead them to be perceived as a 'good employer' or 'employer of choice'. Flexible working practices and a range of rights to time off are part of this.

There are also other reasons why some employers are actively promoting work-life balance. These include:

- to introduce greater flexibility in the workforce and employment contract. This is often related to the move towards what is commonly called 24/7. For example, many financial institutions, service providers and, increasingly, public sector organisations are expected to provide some services outside normal working hours and to become generally more accessible.
- the wider need to recruit and retain 'good people'
- in some cases, concerns about the pressures employees are under, and an attempt to maintain a reasonably healthy and contented workforce.

Policy initiatives

There are a range of policy initiatives promoting 'family-friendly' and more general work-life balance employment practices. Some of these impose statutory obligations on employers while others are aiming at persuasion through positive examples of their benefits.

Amongst a number of reasons for this range of initiatives are:

- EC Directives and the requirement for employment rights to be co-ordinated across Europe
- the increasing participation of women in paid employment, in particular, women with children
- government recognition that the opportunity to work is one of the main ways in which poor parents can escape poverty, and this links to the aim to eradicate child poverty by 2020
- concerns about the 'long hours culture'. Recognition that the need for choice in working hours and flexibility goes beyond those with caring responsibilities.
- to promote equality of opportunity, between men and women, but also those with different needs, responsibilities and wants
- a belief that business competitiveness is enhanced.

The right to maternity leave is long established, although there have been improvements to this. The 1999 Employment Relations Act increased entitlement to ordinary maternity leave from 14 to 18 weeks, regardless of length of service. It also reduced the

qualifying period of employment for additional maternity leave from two to one year continuous employment with the same employer. Under the 1999 Welfare Reform and Pensions Act, Maternity Allowance was extended to women earning less than the lower earnings limit but at least £30 a week on average. The Employment Relations Act also introduced the right to 13 weeks unpaid parental leave for parents with children born since mid-December 1999, until they reach the age of five, and a right to emergency leave.

A recent consultation led to further changes being announced in the March 2001 budget. These include:

- further extensions in Statutory Maternity Pay (SMP) and Maternity Allowance, to reach £100 a week from April 2003
- a further extension of ordinary maternity leave to 26 weeks from April 2003, and an increase in additional maternity leave
- the right to two weeks paid paternity leave from 2003, at the same rate as SMP
- from 2003, paid adoption leave (for the same period and same rate as SMP) will be allowed for one parent, when a child is first placed with a family.

Other initiatives also aim, at least in part, to help working parents, for example, Working Families Tax Credit, the National Minimum Wage and the National Childcare Strategy. A government Work and Parents Taskforce has also recently (November 2001) reported on planned new legislation which will compel employers to go through a formal process when considering working parents' requests for flexible working. This legislation will only apply to parents with children aged under six. Employers will have the right to refuse a request on business grounds but individuals can appeal against a decision. This can ultimately be taken to a tribunal, but only to ensure the employer followed the correct processes in making the decision, the reasons for refusal cannot be challenged.

The focus of government initiatives has largely been on helping those with children combine work and non-work responsibilities. Early in 2000, the (then) Department for Education and Employment introduced a Work-Life Balance campaign. This aims to promote changes in working practices through example and exhortation:

'... everyone has a life outside of work. We may have children or other caring responsibilities, or want time to pursue other interests. Finding ways to link individual employees' needs to business makes sense to both.'

'Work-life balance is about identifying a more imaginative approach to working practices, which will benefit the business and benefit the workforce.'

Work-Life Balance. Changing Patterns in a Changing World (2000)

2.2 Employee demand for work-life balance — the research findings

We now present findings from our own research, in relation to demand for work-life balance. Virtually all the respondents to the questionnaire and the interviewees, including HR, line managers and other employees, agreed that it was important that their job left them with the time and energy to pursue non-work interests and responsibilities. Individuals with childcare or eldercare responsibilities had particular needs. However, there was also widespread agreement that options to work flexibly should be available to all employees, rather than just those with caring responsibilities. The following comments illustrate this point:

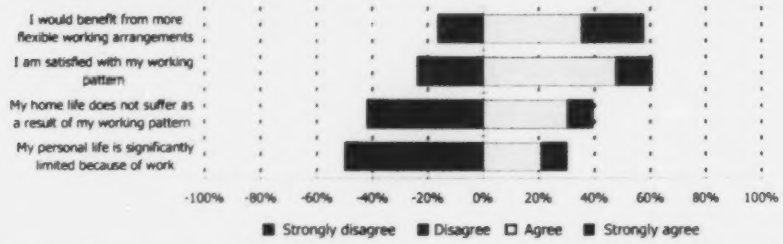
'Self-fulfilment is as good a reason for seeking different work balance as family pressures.'

'Work-life balance is nearly always interpreted as being about childcare – if you don't have kids then it is assumed you don't need to work flexibly. We would all like the opportunity to leave early once in a while. ... Work-life policies need to be fair and equitable and apply to all.'

Other than employees with childcare responsibilities, there was a particular demand for more flexible working arrangements from:

- staff caring for elderly or infirm dependants
- those participating in voluntary or community work
- employees with particular non-work interests, for example, sporting or competitive activities which involved competitions on weekdays

Figure 2.1: Demand for work-life balance



Source: IES Survey

- respondents with long journeys to work (this is becoming more of an issue as travelling becomes more stressful and difficult, with crowded roads and trains and frequent delays)
- those regularly working long hours would like the flexibility to take some time off to compensate, and
- more mature employees who no longer wanted to work such long (or as regimented) hours as in the past.

Our small survey of employees at the participating organisations, included some questions relating to demand for work-life balance. Respondents were asked to indicate the extent to which they agreed or disagreed with a series of statements. Figure 2.1 provides an illustration of some of these responses. (It should be noted that respondents were given the option to neither agree or disagree with the statements, but these percentages have been omitted from the figure.) Here it can be seen that some respondents were dissatisfied with their existing work-life balance and they tended to feel that they would benefit from more flexible working arrangements. Further analysis shows that respondents with childcare responsibilities were more satisfied with their existing work-life balance, than those without. This suggests that their needs had been met. In contrast, those with responsibilities for elderly people or other adults, and those with outside commitments such as voluntary work, or school governors, were less satisfied. This indicates that the work-life balance demands of this group were less likely to have been accommodated adequately. Furthermore, those who had taken up at least one of the work-life balance options on offer (see Figure 4.1, p. 34), were more satisfied than those who had not. However, it must be emphasised that these survey data are

based on a small and unrepresentative sample and therefore should be treated with caution.

There has long been a perceived wisdom that those with caring responsibilities want to work reduced hours. There is evidence that mothers, particularly those with young children, do want to work part-time. However, what many parents and others wishing for greater work-life balance in our research were looking for was the opportunity for flexible working. This also emerged from consultations in relation to the Green Paper, *'Work and Parents: Competitiveness and Choice'*.

A key point from our data is that there appears to be a significant amount of latent demand. While a small number of people had requested a different working pattern and been turned down, many more had not felt able to ask. They were concerned that such a request would, for example, reflect badly on their commitment to the organisation, indicate that they were inflexible or suggest that there was not enough work.

All these issues are explored further in this chapter.

2.2.1 The level of demand

In this section we explore the level of demand for work-life balance practices, as opposed to the level of take-up (which is discussed later in this report). Take-up only provides a very partial indicator of demand. The real level of demand is in many ways difficult to assess, as it may not be expressed.

Many of the employees interviewed for this research stated that they would benefit from more flexible working arrangements. There were varying views amongst HR and line managers about the extent of demand for more work-life balance and flexible working practices. A few felt that the demand was not that great and that those with wants or needs had these met. However, many were not been made aware of a latent demand, as employees were worried about asking for flexible working patterns. Line managers in particular were often concerned about how their business needs could be met with too many, sometimes any, flexible workers. Employees often sensed, or were made explicitly aware of these views, and did not bother to ask.

Other managers, either through their own experiences or talking to staff, felt that there was potentially a much greater demand for work-life balance. For example, in one organisation many women managers had worked flexibly themselves since starting a family. They found few problems with this and could see situations in which their team members would benefit from greater flexibility.

In another organisation, a director reported seeing changes in demand. Younger staff were more likely to recognise that both work and life are important and that they want space in their lives. It was commented that these changes were manifesting themselves in the ways people work, for example, more people job-share and meetings are arranged during core hours. These demands were from both men and women, as many men have young families and want to be home early enough at least on some days to spend time with their children. A director at one of the participating organisations felt that the younger generation had a different view of what they want out of life and are challenging traditional practices. They are not just driven by money but want career breaks for instance to go travelling, or a four day week so that they can pursue other interests. An example was given of an employee who had brought a gîte in Brittany and works from there.

These types of views and experiences are, however, not widespread. In many organisations, employees continue to work long and inflexible hours and are committed to this. They and their managers can see few alternatives to operating in this way, if the demands of the business and their customers are to be met.

Overall approximately half of the employee participants in our research expressed satisfaction with their current working arrangements. Obviously, on the other hand this means half were not satisfied. Nonetheless, discussing latent demand is complicated by the fact that, by definition, it is often not expressed. Our case studies did provide some evidence of unmet demand, and we discuss in detail the barriers to taking up work-life practices and flexibilities in Chapter 5.

2.2.2 The nature of demand

Whatever the actual level of demand, it is also important to understand what employees want. Employee participants in this

Table 2.1: Percentage of employees who would like to take advantage of flexible working time arrangements

	Males	Females	All	Weighted base
Flexi-time	48	44	47	[redacted]
Compressed week	40	30	35	[redacted]
Part-time	21	35	26	[redacted]
Term-time working	22	28	25	[redacted]
Annualised hours	24	18	21	[redacted]
Job-share	13	20	16	[redacted]

Base: All employees not currently using working practice

Source: Work-Life Balance 2000: Employer and Employee Surveys (IER/IFF)

study indicated that it was often not so much reduced hours they would benefit from, as flexibility. Examples of this are the ability to take days off if needed to deal with emergencies, to stay at home to receive deliveries without taking annual holiday leave and to work at home to avoid the strain of long commuting distances. Although some felt that asking for such flexibility would be regarded as a 'favour' many did not. Their view was that this was what was due to them, especially if they often worked long hours and were flexible in matching the demands of their job.

Our research findings reflect those of a recent national survey of work-life balance (*Work-Life Balance 2000*, Hogarth *et al.*, 2001). This research was conducted for the Department for Education and Employment and based on representative sample surveys of 2,500 workplaces and over 7,500 employees. The survey asked if employees would like to take advantage of flexible working arrangements, but have not already done so. Some of the findings are presented in Table 2.1. Here it can be seen that flexi-time and compressed weeks were the most frequently mentioned flexible working arrangements, both by men and women. Other patterns of reduced hours were more commonly requested by women, reflecting the fact they are more likely to be the primary carer for children.

2.2.3 Conclusion

A range of factors have led to increased interest in and promotion of work-life balance issues in recent years. Firstly, changes in the demographic structure have been significant, in particular the greater participation of women in the labour market and the ageing of the population. This has had the effect of increasing the number of people in the labour force who have caring responsibilities or who want to work more flexibly for other reasons, such as in the run up to retirement. Business pressure to maintain and attract a highly motivated workforce is also important. The business driver for flexible working practices has also arisen from the need to remain competitive, respond to customer demands and deliver goods and services in an increasingly 24-hour society. Government has recently introduced a range of initiatives and policy to promote work-life balance, in particular through the extension of maternity leave and unpaid parental leave, as well as a Work-Life Balance campaign.

The research findings indicated that the demand for better work-life balance does not just come from employees with caring responsibilities. They also showed that it is not only formal flexibilities such as career breaks and reduced hours that employees would like to take up but also more informal or *ad hoc* flexibility. A further key point to note is that there is a considerable amount of latent and unmet demand for such flexible working, which has not been expressed to the employer. In Chapter 5, we discuss the reasons for employees not voicing their requests for flexible working, but prior to doing so we first outline the options employers make available in Chapter 3 and then consider the level of take-up and the benefits of taking up these work-life balance options in Chapter 4.

3. Work-Life Balance Options Offered by Employers

It was clear that all six organisations studied had well-established policies and practices aimed at catering for their employees' work-life balance needs. In fact it was precisely for this reason the employers were invited to participate in the research.

In this chapter, we consider the types of flexibilities and approaches employers in our research and other studies are taking in relation to work-life balance. We first discuss the employers' attitudes towards work-life balance issues, in particular the views of the HR function within organisations. We then outline what employers offer in terms of policy and practice. However, most of the organisations in which this research was conducted understood that work-life balance was about going beyond HR policy and practice. For example, cultural change programmes were being implemented, which were seen as facilitating their approach to work-life balance. We therefore also consider these change programmes. Finally, we discuss access to work-life balance options, *ie* to whom such options are made available.

3.1 Employers attitudes towards work-life balance

Within all of the case study employers, an HR manager was interviewed who had responsibility for work-life balance or diversity issues. All these managers were committed to and understood the benefits of introducing work-life balance initiatives. The pressures leading employers to introduce such

policies have been discussed in Chapter 2. As an example, one employer identified both external and internal pressures to make flexible working options available to their employees:

- external pressure from government, in order to implement and reflect work-life balance policy initiatives, and
- internal upward pressure from employees based on evidence from staff surveys, in order to attract and retain employees and to be an 'employer of choice'.

Employee retention was a particular issue for a health sector employer, offering flexible training options for junior doctors. As more new entrants to the profession are female and with caring responsibilities, it is recognised that their needs must be accommodated in order to retain such expensively trained staff. Some HR respondents also felt that work-life balance options were critical in addressing diversity issues. It was understood that inflexible working patterns will attract only one type of person, but effectively discriminate against others.

To provide a context to our own research findings, we present below some findings from the recent national study of work-life balance (*Work-Life Balance 2000,* Hogarth *et al.*, 2001). Employers and employees were asked to respond to a series of attitude statements relating to work-life balance issues. The data presented in Table 3.1 shows that employers are generally supportive of work-life balance needs, with over 90 per cent of employers agreeing that people work better if able to balance home and work effectively. Employers' views were also largely in accordance with employees. Nonetheless, meeting business goals is clearly the first responsibility of an organisation.

From this and our own research it appears that employers aim to achieve 'win-win' solutions which benefit both the employer and employee. For example, one of the HR managers participating in our research explained that the employer was shifting the responsibility to its employees to identify solutions to their work-life balance needs. Previously, the culture of this organisation was described as paternalistic, and personnel managers took a very hands on approach. The aim now is to match individual needs with operational needs as far as the business allows. As such, the employer makes a range of options available and the individual is generally expected to take responsibility for identifying an appropriate solution.

Table 3.1: Work-life Balance 2000 survey: support from employers and employees for work-life balance

Statement	Employers % strongly agree/ agree	Employees % strongly agree/ agree
Everyone should be able to balance their work and home lives	62	81
The employer's first responsibility has to be to ensure that the organisation achieves its goals	85	84
Employees must not expect to be able to change their working pattern if to do so would disrupt the business	58	54
It is not our [the employer's] responsibility to help people balance their work with other aspects of their lives	24	36
People work best when they can balance their work and the other aspects of their lives	91	96
Policies that help staff balance work and other interests are often unfair to some employees	42	26
Base:	All employers	All employees

Source: Work-Life Balance 2000: Employer and Employee Surveys (IER/IFF)

From the data shown in Table 3.1, there also appears to be some concern about unfairness or 'backlash' from other staff when offering work-life balance options. We return to this point in Chapter 6. This employer survey also found that employers who had introduced work-life balance policies and practices were more likely to be supportive and have positive attitudes towards work-life balance issues. An important point to note, however, is that the views outlined by our own HR respondents and those identified by this survey are the views of the Human Resource function within the organisations. These may not necessarily reflect the view throughout the organisation. We also return to this point in Chapter 6.

3.2 Work-life balance policies and practices

Before detailing our own research findings in relation to policies and practices the sample of employers offer, we first present previous research and other published literature, to provide a context.

3.2.1 Work-Life Balance 2000

The Department for Education and Employment research (Hogarth *et al.*, 2001) provides a good illustration of the types of practices and flexibilities offered by employers. This shows the wide range of options available, beyond the statutory minimum. While most employers offer bereavement leave, and many offer part-time working, working from home and care leave, many of the other options are less common.

However, our research indicates that employers often respond to individual requests and needs, and consider each case on its own merit. Therefore they would not provide some work-life balance options until an individual requested them to do so. It should also be noted that these options are not necessarily made available to all individuals within an organisation, a point we return to in section 3.4.

3.2.2 Employer awards

Examples of work-life balance 'good practice employers' now abound and employers compete keenly to be recognised as an 'employer of choice' and for 'family friendly' and work-life balance awards.

One such award was the Lloyds TSB/Parents at Work/ Department for Education and Employment Employer of the Year 2000 award. As an example, The Kings Health Care Trust, a winner of this award, offers its staff a ten point package of flexible working practices: part-time working, job sharing, temporary reductions in hours, staggered working hours, annualised hours, phased return to work, special and parental leave, working from home, career breaks, and personalised annual leave whereby individuals can buy or sell annual leave (Mahoney, 2000). Another award winner, Listawood Ltd, which manufactures promotional products, organises working practices around the needs of its workforce with childcare responsibilities. Part-time workers have the same prospects as full-timers and flexible working options are not restricted to family needs (Jackson, 2000).

Table 3.2: Work-Life Balance 2000 survey: workplace flexibilities and facilities employers offer

Workplace flexibilities and facilities	% of establishments offering the flexibility or facility
Provides any WLB practice	97.4
Bereavement leave	91.0
Part-time working	76.1
Care leave	55.9
Paternity leave	44.5
Allows varying hours	38.3
Compassionate leave	38.0
Career breaks	27.0
Workplace counselling or stress management	26.0
Study leave	22.5
Working from home	22.5
Territorial army leave	13.9
Information about local provision of childcare	11.9
Flexi-time	11.5
Information about provision of other care	8.0
Term-time working	6.6
Help with childcare arrangements during school holidays	6.1
Job-sharing	5.6
Reduced hours	4.5
Financial help with employees' other care needs	3.3
Other types of financial help with employees' childcare needs	3.0
Compressed week	2.5
Annualised hours	1.9
Crèche	1.7
Subsidised nursery places outside of work	1.1
Base: all employers	

Source: Work-Life Balance 2000: Employer Survey (IER/IFF)

3.2.3 Options offered by IES research participants

The employer participants in our research were selected precisely because they had been identified in the literature as good practice employers or had won awards for their approach to work-life balance. For this reason, it is no surprise that a wide range of flexible working and work-life balance options were on offer. In Table 3.3, we present the options offered by four of the employers, where we conducted in-depth research.

All of the HR respondents reported that work-life balance or family friendly options were well established in their organisation. For example, one employer had had a flexible working policy for many years, but now it is being made more public. A public sector employer had long standing flexible working hours, maternity and emergency leave polices, and it was now extending its offer. A retail employer stated that flexibility was a way of life in the organisation and has been for many years. Each member of staff has a unique working pattern and contracts are designed for each individual. Jobs are designed to fit operational needs but they aim to match the operational needs with the individual's needs as far as the job allows. All benefits are applied pro rata.

Many of the employers had recently, or were in the process of, adapting and updating their work-life balance policies. Many were shifting from referring to their policies and practices as 'family friendly', to making it clear that the options on offer were available to all, by using the term 'work-life balance'. One employer explained that while they had offered 'family friendly' options for many years, they were now in the process of 'refreshing' their policies. Another employer was developing a home working initiative. Previously, working at home was an informal arrangement. The organisation is now introducing a pilot scheme, investigating how home working can be formalised, what investment is needed to support it and whether it works. Another example of revising options on offer was in order to meet business needs. The retail employer had found that a 7am to 9am slot was particularly difficult to resource, as this does not appeal to working parents. To address this issue, they now offer full-timers the option of working four long days starting at 7am and this had been well received by staff. The

Table 3.3: Work-life balance options offered by IES research participants

	Case Study A	Case Study B	Case Study C	Case Study D
Part-time working	■	■	■	■
Job-sharing	■	■	■	■
Flexi-time	■			
Term-time working	■	■	■	■
Family/emergency leave	■	■	■	■
Extended maternity leave	■	dependent on length of service		■
Paternity leave	■	■		
Adoptive leave	■	■		
Fostering leave	■	■		
Flexible holidays/unpaid leave	■	■	■	■
Time off for community and public duties	■	■		
Career breaks for family reasons	■	dependent on grade	■	
Career breaks for other reasons	■	■	■	
Nursery places	■	■		
Crèche/other childcare help	■	■		
Home working	■ on an informal basis	■ depending on the job	■	■
Other facilities	Occupational health services Advice & counselling on health & personal matters at home or work	Gym Welfare helpline	Doctor, dentist, gym	Health programme
Notes	Wide range of flexible working practices on offer. It is up to individuals to ask & managers to agree.		Wide range of flexibilities on offer but each request judged on own merits. Creative solutions can be arrived at to suit individual needs	These flexibilities have been on offer for a considerable period of time. Now focusing on creating a culture which will facilitate take-up

Source: IES, 2001

respondent explained that it was increasingly necessary to identify solutions such as this because of staff recruitment and retention issues.

3.2.4 Implementation of work-life balance policy

In all the organisations visited, the availability of such flexible working options were communicated to staff through a variety of means. Two of the employers had recently published a booklet providing details of all the options available. The policies and practices were also communicated through intranets and staff magazines and notice boards.

In most cases, any applications to take up the options available had to go through the individual's line manager in the first instance. As one HR respondent explained, any application has to be discussed with the line manager to go through the arrangement and how it could work. HR managers generally only become involved where there is a particular issue to be resolved or line managers request guidance. Generally, respondents also reported that it was up to the individual to select or identify an appropriate solution to their own need. The employer's role is to support and to facilitate, not to provide solutions. As one HR respondent explained:

> *'If you have a problem, we will support you while you sort it out, but we won't sort it out for you; you have responsibility for the solution.'*

As such, options tend to be delivered with the line manager's discretion, and HR guides the line. One employer gave the example of a man whose partner was suffering from post-natal depression. This individual was able to take extended leave to support her. The HR respondent explained that line managers need to be able to make decisions when this type of option is appropriate. This organisation has a grievance procedure in place to ensure consistency and fairness. It is not used very much, but the HR respondent felt the fact that it was there helped to prevent unfair practices.

Employers also explained that although options are open to all, they would not necessarily be available in all cases. As noted

above, employers aimed to match business needs to individual needs. As an example, one employer judged each request on its own merits. It has been communicated to staff that these options are not available to all and will be offered in a flexible way. However, creative solutions can be arrived at or a trade-off can be made. We return to this issue of access to options available in section 3.4 below.

3.3 Attitudes and behaviours

In most of these organisations it was recognised that work-life balance is about going beyond HR policy and practice, and employers were implementing cultural change programmes. Work-life balance was considered to be an integral part of these changes. For example, one organisation was focusing on its core values of respect and trust. Another was attempting to move away from a culture that clients come first regardless, and a third was moving away from being a 'paternalistic' employer to one where responsibilities were devolved to staff. As such, these employers were challenging the way work is done and whether this needs to continue to be the case. The following quotes illustrate comments made by HR managers in these organisations:

> *'You can't just put work-life balance policies in place with your fingers crossed that it will work.'*

> *'Work-life balance is about culture values and managing people to create a climate where people feel empowered to state their own demands ... and the ability to enter into a conversation to work out a solution.'*

Some of the reasons given for taking these approaches were:

- to move away from the perception that work-life balance policies and flexibilities are only aimed at women with children, and to gain an understanding within the organisation that the options are open to all
- to move away from a long hours culture
- because with a rule book or a policy there is a tendency to get compliance from employees rather than creativity, the aim is that individuals think creatively about their own needs and wishes
- to create an environment whereby individuals are able to negotiate their own way around work-life balance, and

- because individuals are not necessarily interested in taking up specific options, such as part-time working or a career break, but rather they want to achieve a better balance between their work and life outside.

Some of the approaches employers were taking to change attitudes and behaviours within the organisations were:

- development and dissemination of carefully worded values
- values champions
- work-life balance champions and role models
- staff surveys
- focus groups to tease out the issues emerging from staff surveys
- workshops and staff development programmes, such as the work-life balance and personal effectiveness programmes. As reported in previous IES research, this type of programme was being cascaded down through the organisation at Barclays Technology Services (Kodz *et al.*, 1998), and
- a work-life balance related initiative to focus upon each year, for example one of the participating organisations in this study was focusing upon health issues at the time of the research, in another year the focus was stress management.

The following two examples provide an illustration of these types of change programmes.

Public sector organisation

This organisation was underpinning its approach by embedding the core values of respect and trust. They do not want to be hierarchical or take a top down approach, rather they want the whole organisation to understand that learning can best be achieved in an environment of forgiveness and support. The idea of mutual support is seen as very important and these ideas are being built into all that they do, in particular their performance management system. They are trying to be more involved in things that happen in their staff's lives, and for staff to be more involved with the organisation. For instance, everyone has been able to choose the colour of the walls in their office, they have also been able to choose the furniture and layout of common areas such as a lounge. As a senior manager commented:

'This is the kind of thing that can happen when you are not focusing upon rules and procedures ... staff are not machines, but human beings that have needs that go beyond putting oil in a machine.'

Professional services organisation

This organisation was undertaking work under the banner of 'values' which they believe is the bigger picture within which sits the issue of work-life balance. This initiative has been led by senior management. The three elements of the values are knowledge, clients and people. They believe that it is necessary to understand the existing value system within an organisation in order to encourage it to change. From their analysis they discovered the three core elements of knowledge, clients and people. The values have not been imposed by managers, but developed from discussions with employees. They now have a values charter on the walls of their offices, and this charter is full of people centred values, including work-life balance, rather than just client or knowledge related values. It is understood that embedding these values and for them to become a common language will take time, but will lead to changing expectations of employees. They feel they are creating an environment where workers are able to state their other demands or roles outside work, so that they may be taken into account when making work decisions.

3.4 Access to work-life balance practices and options

Work-life balance policies and practices do not necessarily mean that all options offered by the employer are available to all members of staff. As outlined in Table 3.3 (page 25), some options and flexibilities are dependent on grade, such as career breaks in Case Study B, or length of service for example extended maternity leave. In this respect, some options are regarded more as a perk for some members of staff, rather than a right for all employees. Furthermore, as already noted, in many organisations each request is judged on its own merits, and only granted if they can fit with business needs. In this section, we draw upon some previous research relating to access to work-life balance options as well as discussing our own findings further.

In terms of types of organisations which are more likely to offer flexibilities, the Department for Education and Employment Work-Life Balance 2000 survey (Hogarth *et al.*, 2001) shows that public service sector organisations and larger employers are more likely to offer formal flexible working practices such as annualised hours, compressed weeks, job-sharing and term-time working. It is likely that informal flexibilities are offered by small employers. In relation to who overall can gain access to such

practices, a study of women in the United States has found that women in full-time employment for longer periods of time were more likely to have access to family friendly practices. More worryingly this research showed that ethnic minority women were significantly less likely to be offered such practices by their employer (Caputo, 2000). Similarly, a UK study has found that middle-class employees were more likely to enjoy assisted childcare, career breaks and time off for family matters than low-paid workers (Dean, Economic and Social Research Council, 2001 cited in Taylor, 2001). However, this research has been criticised for being based on a very small sample of 47 low income families (Taylor, 2001).

The Work-Life Balance 2000 survey also analysed the extent to which these types of flexibilities are restricted to certain types of staff (Hogarth *et al.*, 2001). In Table 3.4, we present some of their findings. It can be seen in some cases that it is only half of the employers offering the work practice, who offer it to all of a

Table 3.4: Eligibility for working practices offered by employers by full- and part-time employees

Category of employee & eligibility	Annualised hours % of employers	Compressed week % of employers	Term-time working % of employers	Flexitime % of employers
All full-time staff eligible	57.7	68.7	53.7	81.5
Some full-time staff eligible	20.5	22.3	23.1	12.9
No full-time staff eligible	8.2	5.4	17.4	2.2
All part-time staff eligible	56.6	74.6	62.8	84.2
Some part-time staff eligible	16.9	6.7	27.7	11.7
No part-time staff eligible	14.4	17.2	9.9	3.1
Weighted base	*9472*	*9479*	*27,611*	*29,045*

Base: All establishments with working practice

Source: Work-Life Balance 2000: Employer and Employee Surveys (IER/IFF)

particular group of staff, and as such another half of employers restrict the eligibility. For example, only 54 per cent of employers providing term-time working offer this to all full-time staff, a further quarter restrict it to some full-time staff. Overall, the survey found that around two-thirds of employers placed restrictions on eligibility to annualised hours, compressed weeks, and part-time working. Fewer placed restrictions on flexi-time and reduced hours, and over half of employers placed restrictions on their offer of term-time working. There were few differences in eligibility between categories of staff, *ie* senior and junior managers, non-manual and manual staff.

The Work-Life Balance 2000 survey also looked at managerial discretion over work-life balance practices. This showed that in over half of the employers surveyed, managers had a great deal of discretion over work-life balance practices, over a quarter of employers gave managers a fair amount of discretion. In approximately ten per cent of establishments management had a little discretion, and it was only in about one in twenty organisations where management had no discretion at all.

In many of the organisations in which we conducted research, requests for work-life options were considered on a case by case basis, granted according to the needs of the business and sometimes on a first come first served basis. One line manager even mooted the idea that she was more likely to grant a request for flexibility to more valued members of staff, although this was not company policy. Respondents also reported that there was concern initially when relaunching their work-life balance options that they might be inundated with requests. This worry has not actually materialized, and in the following chapters we consider in more detail the take-up of such practices.

3.5 Conclusion

The evidence from both our own and previous research suggests that employers are offering a wide range of work-life balance and flexible working practices to their employees. In some cases this offer is formalised and eligibility clearly specified, in others it is informal and responsive to individual requests. Amongst our participant organisations, the practices on offer do broadly match those employees have suggested they would benefit from, as outlined in Chapter 2. However, there is clearly some

variation in access to such practices. This is either because some flexibilities are offered as a perk to more senior and long-serving employees, or because the offer is made on a case by case basis depending on the needs of the business, and the decision is often left to the discretion of line managers.

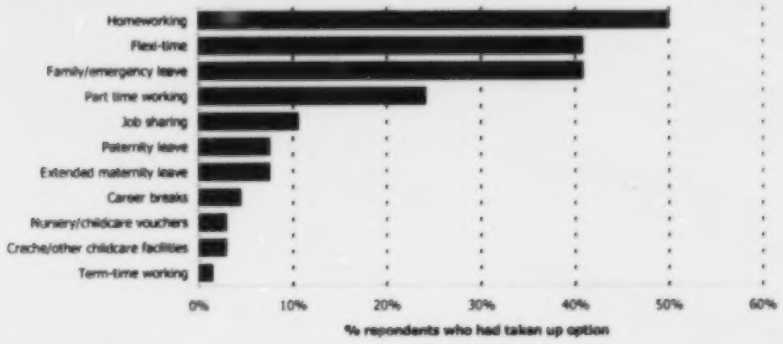
4. Take-up and Benefits of Work-life Balance Options

A common observation made by HR managers was that although they had made significant efforts to introduce flexible working practices, take-up amongst their staff had so far been relatively low. Compared with the level of latent demand described earlier (in Chapter 2), there appears to be a 'take-up gap'. In this chapter, we consider the level of take-up of these policies and practices amongst employees in our research, and explore the gap between the options available and the levels of take-up we have observed. (Factors which might explain this gap are identified in Chapters 5 and 6.) Nonetheless, within the case study organisations, there clearly were examples of good practice. This chapter therefore goes on to consider the benefits, both for the employer and the employee, of these work-life balance policies and practices when they are taken up and work well.

4.1 Level of take-up of work-life policies and practices

HR managers interviewed for this research reported that despite their efforts to introduce flexible working practices, take-up amongst their staff had so far been lower than they might have expected. Our case studies suggested that generally take-up of options such as part-time work, dependency leave, career breaks and job share were higher amongst women, lower grade staff and for those for whom their career is not their priority. There was very low take-up reported across the board of term time working, career breaks, job share and unpaid leave. Within one

Figure 4.1: Take-up of work-life balance options



Source: IES Survey

organisation, take-up was perceived to be higher outside their London head office, where culture and attitudes towards working flexibly were different and there was less work pressure. Figure 4.1 provides an illustration of take-up amongst our survey respondents. However, some respondents were invited to participate in the research precisely because they had taken up work-life balance options. Therefore, these respondents are not necessarily representative of the workforces in the participating organisations as a whole.

Our evidence is clearly based on a small and non-representative sample of employees. However, it generally reflects findings from the DfEE study (*Work-Life Balance 2000*, Hogarth *et al.*, 2001) which showed that:

- Take-up of all flexible working time arrangements was relatively low within organisations offering such options (flexi-time and part-time work are the exception).
- Take-up is higher in the service sector, especially in public services.
- Women were more likely to take up the arrangements than men.
- Non-manual workers were more likely to take up flexibilities than senior and junior managers and manual staff.
- Where there is provision of a written policy on working time arrangements, take-up by employees was higher, however, the reasons for this association are not clear.

- There is higher take-up where no restrictions are placed on eligibility.
- Where managers had no discretion as to whether the flexible arrangement was available or to whom it was made available, take-up was higher.

We now turn to the findings of our own research. Case study participants expressed some concern about the level of take-up. HR managers realized that if the employer and employee were to reap the benefits of flexible working and work-life balance, obstacles preventing people from taking advantage of the options available needed to be addressed. They were well versed on the potential benefits of such practices and were able to cite a number of examples of where their work-life balance initiatives had worked well. Therefore, before going on to discuss the reasons for this take-up gap, we first consider the benefits to individuals and organisations when options are taken up.

4.2 Benefits for employers

In general, the employers we interviewed were very positive about the business benefits of such policies and practices, although one in particular noted that it was not for such benefits that they were pursuing work-life balance strategies. The reason given by this employer was that it was 'the right thing to do and the right way to treat people'. A more typical response was that greater flexibility in working patterns had many benefits, as one explained their policy:

> *'... has proved of enormous benefit; helps keep staff, staff are happier and organisational needs are met.'*

In this section we discuss each of the key benefits employers identified: improved productivity and quality of work, increased staff commitment and morale, reduced staff turnover, reduced casual absence and improved attraction of new staff. For each we draw both on our own findings and some previous research, in particular, the study conducted by Bevan *et al.* (1999), *Family-friendly Employment: The Business Case*. A key point to note is that these benefits are difficult to quantify, and the data we have collected is largely anecdotal.

We also briefly outline some concerns employers have about the possible disadvantages of introducing work-life balance policies and practices. However, it should be noted that HR representatives who participated in our research rarely expressed such concerns.

4.2.1 Improved productivity and quality of work

Previous research has shown that employers tend not to have direct evidence of improved productivity arising from the introduction of more flexible work practices designed to meet the needs of individuals (Bevan *et al.*, 1999). Nonetheless, many employers are convinced that employees working more flexible hours are more productive than those working traditional hours, and that these gains are manifested both in terms of quality of work and actual outputs (Bevan *et al.*, 1999). In our research, improved work performance was one of the key and most frequently mentioned benefits identified. Notably, over 90 per cent of employee respondents to the small questionnaire survey agreed that they were more productive at work if they were able to balance work and life effectively. The general consensus was that people happy at home were more likely to perform to the top of their ability at work.

Managers interviewed gave a number of examples of this improvement of employee work performance. For instance, gaining more value or greater productivity from staff working part time or reduced hours was noted. One manager spoke about a marketing executive who worked three days per week. She felt that the work output of this individual matched those working five days per week.

Employees confident in the knowledge that their outside needs are being attended to were thought to be less distracted and more focused on their work. Some HR managers gave examples of individuals who become noticeably less anxious once their life situation was taken into account by the organisation. One in particular explained that people are more relaxed at work if they know they can take time to deal with domestic issues. They are less likely to bring problems to work with them, or be distracted by trying to sort out domestic and personal problems while at work.

Another benefit reported was that staff who are able to balance work and life outside effectively are more refreshed when they come to work. In particular, managers gave examples of staff being fresher after a three or four day weekend. Later starts can mean staff can avoid travelling during rush hour, leaving more energy for the working day. A similar effect was seen from individuals who returned from a short career break:

> *'Clearly we lose the person for the six to eight months that they are off, but we gain in spades when they come back.'*

Flexible working hours were also thought to promote better quality work. For example, some people are better in the morning and some later:

> *'People can give their best time, rather than having to be in 9 to 5, for example if they are not very good at getting up in the morning.'*

One person who used to work 8am to 8pm now does three and a half days a week:

> *'I feel more vibrant, have better morale and think that my output is better.'*

One of the employers was facilitating their work-life balance initiative through a cultural change programme, promoting people centred values. As a result of this initiative, they felt that staff had become better team workers.

4.2.2 Improved commitment and morale

Related to this, is increased commitment and morale. Again a common perception was that if employers:

> *'... treat people well, they will put in the extra effort when it is needed.'*

In the study of small employers conducted by Bevan *et al.* (1999), it was found that a small number of firms had conducted staff surveys that showed that family-friendly practices were viewed positively by employees. Overall, most firms believed that morale and commitment among employees with caring responsibilities was enhanced by family-friendly policies. Furthermore, a UK study in a supermarket chain found that a 20 per cent increase in

staff commitment led to a nine per cent increase in sales per store per month (Barber *et al.*, 1999).

A participant of our research attributed their high levels of staff satisfaction to the flexibilities they offered. In their staff survey, 81 per cent of staff reported that they were satisfied with their work and their employer overall. From our small survey of employees, 90 per cent agreed that if all employees were given opportunities to work flexibly to suit their own needs, they would be more committed to their employer. The following are a range of quotes from employer participants of our research.

> *'We get back tenfold what we do for them, when giving time off for outside responsibilities, especially in terms of good will shown by staff.'*
>
> *'People feel valued; there is give and take on both sides.'*
>
> *'People feel more committed to the organisation and their boss because of flexibility.'*
>
> *'People are more loyal and pay back in terms of commitment and flexibility.'*
>
> *'Treat people well and they will put in the extra effort when it is needed.'*
>
> *'There are procedures which have to be done at certain times of the month. People are aware of this and try to make sure they are there; they would not normally take flexi-time then. People are responsible about what they are doing.'*

4.2.3 Reduced staff turnover

Improved retention of employees is often a more tangible and easily quantifiable benefit of work-life balance policies and practices. In the IES long hours culture study, Barclays Technology Services (the provider of IT services to the bank at the time) introduced a development programme focusing on individual performance and work-life balance. They attributed their fall in staff turnover to two or three per cent (very low for the IT sector) to this programme and their other flexible working options on offer (Kodz *et al.*, 1998). In the small firm study (Bevan *et al.*, 1999) each of the employers was able to identify individuals who had stayed with them longer because of their access to family-

friendly provision. Most could estimate the number of employees who would have left had such provision not been available. None had calculated the costs of replacing these people, nor had they put a cost on the provision of these policies. However, most were convinced that the retention of key people with key skills was demonstrably beneficial to the business.

In some cases, this study of small employers estimated the costs and benefits of certain family-friendly arrangements, including the direct costs of replacing leavers. Here it was possible, using rudimentary company data, to establish that replacing a leaver was likely to cost a minimum of one-third of the recruit's first year salary (Bevan *et al.*, 1999). It was also found to be possible to estimate the savings to an employer accruing from the extended tenure of a post due to work-life balance provision. The research reported that the financial benefits could be considerable, even when the costs of providing the family-friendly policies were offset against these savings. Linking these improvements to staff retention to output, an American study of high performance work practices found that a seven per cent decrease in turnover leads to increase in sales of £18k per employee (Huselid and Becker, 1995).

Our study also illustrated reduced staff turnover as a benefit of their work-life balance strategy. The organisation which appeared to have the most work-life options on offer reported that staff turnover was eight or nine per cent. This was considered to be particularly low in view of the fact they were a relatively small organisation and a high proportion of staff were young and upwardly mobile. Respondents also considered that they may well have lost staff if they had not been given the opportunity to take a career break or reduce their hours. For example, one manager reported that two high performing individuals had been retained as a result of the options they offered. Both of these were unable to work full-time and would have left if there were no opportunities to work part-time. Similarly, there were many examples of staff reporting how opportunities to work flexibly kept them with their employer. Indeed, one had returned after finding it too difficult to manage the hours in another job. The opportunity to work from home was particularly valued by those who commuted long distances or had a difficult journey to work, especially if they also worked long hours. The HR respondent concluded that:

'... it is expensive to recruit, train and bring new people up to speed in the job only to lose them because of inflexible working hours. To keep good people is a very good business case for flexible working.'

4.2.4 Reducing casual absence

Reduced casual sickness absence was a benefit identified by the small firms research (Bevan *et al.*, 1999). Most respondents were clear that absence due to sickness of a dependant rather than of the employee had reduced. Employees felt able to be more honest about sickness absence than previously. Reduced days lost also reduced direct costs and the indirect costs of organising cover and lost or delayed business. Other research has shown that one-third of sickness absence is linked to domestic caring responsibilities (CIPD, May 2000). Also, an American study showed that childcare breakdown accounted for 5.28 days lost per employee (Bright Horizons Family Solutions, 1997).

In addition, arranging absence cover is often much easier in organisations where there are a range of flexible working practices. For example, job-share partners will often cover for each other when they can; most people are happy to flex their hours, especially in an emergency or to cover a short-term need (Bevan *et al.*, 1999). This finding relating to job sharers was borne out at one of the employers participating in our research. Job-share partners would often come to work on days other than their contracted days in order to cover for each other.

Less *ad hoc* absence was also reported as a benefit by our employer respondents. This was reported by one employer in particular. Through having the flexibility to adjust working hours, work part-time and take emergency leave, staff were found to be more able to deal more effectively with domestic and personal issues without these affecting their work. This is one reason for less *ad hoc* absence:

'People don't like taking time off, they will use flexible working patterns to do non-work things.'

'Less absence to deal with ad hoc *domestic problems.'*

Flexible working, whether in the ways mentioned above, or home-working, which avoids travel, were also thought to reduce anxiety and in turn reduce sick leave.

4.2.5 Improved attraction of new recruits

The previous research has also found evidence from recruitment processes which suggests that the ability to offer work-life balance practices can attract potential recruits seeking vacancies and when making comparative judgements of job offers. It was felt that the practical support provided, and the general impression of the company culture and values made an employer more attractive to potential recruits (Bevan *et al.*, 1999). Respondents to our research agreed that these benefits were likely but were not able to provide any evidence of such effects.

4.2.6 Employer concerns

Some employers have concerns about introducing work-life balance policies and the possible disadvantages that may arise. A range of such concerns identified by previous research are detailed below. However, our employers rarely raised such concerns and where they did, the feeling was that any such potential costs were outweighed by the benefits.

- Setting a precedent: they worry that general availability of such policies will 'open floodgates' to unlimited demand, or encourage employees to reveal hitherto concealed caring responsibilities.
- Incurring costs with no benefits: they can often see the benefits to the individual but are concerned that the benefits, to the business are more diffuse and less easy to quantify. This makes them reluctant to commit beyond the discretionary application of a set of practices to selected employees. Formal policies appear less easy to control.
- Rights without responsibilities: they are concerned that employees might regard work-life balance policies as an entitlement for which no return to the firm is required. Underpinning this concern is a fear that some employees will take unfair advantage of a policy, whereas discretionary application of an *ad hoc* practice is easier to target.

- Backlash from non-carers: they are concerned not to antagonise non-carers by appearing to treat working parents *etc.* more favourably.

Some of these issues, in particular those relating to backlash from non-carers are discussed in more detail in Chapter 6.

4.3 Benefits for individual employees

In relation to the benefits for individuals of taking up work-life balance practices and flexibilities on offer, there appeared to be significant amounts of anecdotal evidence amongst employees at the case study organisations. Many questionnaire respondents agreed that their employer offered better opportunities to balance work and life outside than other organisations. Many were also satisfied with their current working pattern. Those who had taken up flexible options listed the following benefits of having done so:

- the ability to carry on working and have time for their family
- not feeling guilty about taking time off work if their children are ill, as they can take such dependency leave legitimately
- the ability to pursue a career and have a family, and
- generally feeling happier in themselves.

Many of the female respondents with children, stated that it would be virtually impossible for them to combine work and family responsibilities without flexible working patterns. In some cases, flexible working options also helped men take a greater role in childcare and other domestic responsibilities. Furthermore, respondents commented that many people, whether they have caring responsibilities or not, have outside interests which, if working a standard 9 to 5 day or long hours, it would be impossible to participate in.

Our evidence shows that people use flexible working hours in many ways. For example, rather than having to take leave or negotiate time off, flexible working hours can be used to wait at home for someone to do a repair or make a delivery, or for doctor and dentist appointments. School events can be more easily attended. Staff who worked flexible hours valued being able to take time to deal with all these events and activities without having to justify to anyone a need to take time off, or tell

anyone their personal business. Respondents working flexibly in this way also reported that they were more relaxed at work as they knew they could take time to deal with domestic issues.

We also heard about examples, such as a commuter travelling weekly from the Midlands to London, being allowed to work two days a week at home, which had significantly improved the individual's quality of life. A retail employee was very impressed by having been granted paid leave in order to sort out problems when a gas fire blew up at home. Also, a surveyor was very grateful to have been allowed to work part time after having a baby, as there are few part-time opportunities available in her profession.

The following quotes provide further examples of some of these successes.

> *'I can satisfy all my commitments in and outside work. And I know they're catered for so I'm not distracted by worrying about them.'*

> *'I live in [...] and work in London. Several months ago I agreed with my line manager and with the [senior manager] that I could work from home 2 days a week to help me achieve a better work-life balance. I was provided with a laptop, a full size monitor, a keyboard and mouse and a separate phone line. It has made a world of difference to me being able to work from home. I work long hours and it had reached the point where I was arriving home at midnight on Friday, recovering on Saturday and preparing to return to London on Sunday – no quality of life at all .... Flexi-working in the [department] is also helpful as I have some caring responsibilities for a terminally ill relative and for my partner's children.'*

> *'I have been employed by [...] since July. My father was very ill in September and I asked to transfer to part-time working in October. My line managers were very supportive; and I am very grateful for their consideration. If my [department] had been less flexible I would have been stuck in a very awkward position, as Personnel cannot just create posts for staff who, like me, find themselves in difficult domestic circumstances.'*

> *'My manager and I both work part time in different patterns because we both have children. It requires extra organisation to ensure that we discuss and agree matters relating to our work at the right time but, in general, this works perfectly well.'*

'I am comfortable with my own working pattern. I was particularly impressed in how the organisation approached my (and my fiancé's) request for six months off (leave of absence) starting October 2001, no problems whatsoever.'

'I am very happy with my current working arrangement. My manager supports me fully to work as I wish.'

'I have been given the opportunity four and a half years ago by a woman senior manager to job share. My existing male senior manager was not prepared to do this. I believe we have proved job share can work successfully and have also applied internally for our present job as a job share team and got it over other internal and external applicants. The week is split two and a half days each and I believe that this brings new enthusiasm and different skills to both sections of the week. Both myself and my job sharer try to ensure there are no gaps, and that we know exactly what the other person has done.'

4.4 Conclusion

Research evidence suggests that there is a work-life balance 'take-up gap'. Even where employers appear to be offering the types of flexibilities employees want, the propensity of employees to take advantage of them is much lower than the latent demand amongst employees (as detailed in Table 2.1, page 17). This appeared to be an issue that employers participating in this research were concerned about. It is recognised that if the benefits both to the employer and the individuals are to be realised, any barriers to take-up need to be addressed.

The employer participants had a strong conviction that there were significant business benefits to be had from introducing work-life balance initiatives and flexible working practices. Some of the business benefits identified included improved productivity and quality of work, greater employee commitment and better morale, reduced staff turnover and less casual absence. Nonetheless, tangible evidence of these benefits is often hard to come by, mostly because many of the benefits are difficult to isolate and to measure. For employees, the key benefit of taking up work-life balance options are the ability to combine work and non-work responsibilities and interests. In the following two chapters, we turn to explain some of the reasons for the 'work-life balance take-up gap'.

5. Obstacles and Difficulties Employees Experience

This and the following chapter set out to explain the work-life balance 'take-up gap' which we have identified. We report here the obstacles employees face as they consider and/or take up work-life balance options. We then discuss difficulties for their managers and co-workers in Chapter 6. Put together, these two chapters work towards explaining why take-up of work-life balance options is not as high as employees' initial interest and their latent demand might suggest.

We asked employees about their experiences and their decisions.

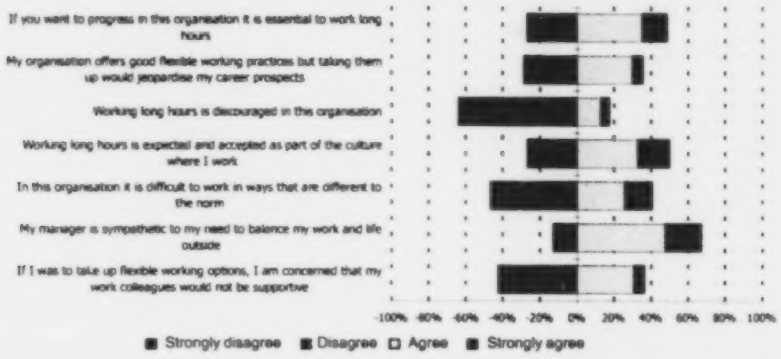
- With employees who had taken up work-life balance options, we explored whether they had experienced any difficulties in taking up their chosen options and if so, what these were.
- With employees who had been interested in but *decided against* taking up work-life balance options, we discussed the factors that had *prevented them* from taking up the available options.

We report our findings in this chapter. We combine the results of our discussions and survey, with findings from previous research and observations made by commentators.

5.1 Difficulties experienced when work-life options are taken up

Employees who had opted to work reduced or different hours experienced a number of difficulties having done so; those causing them most concern are reported first.

Figure 5.1: Concerns about taking up work-life balance options


If you want to progress in this organisation it is essential to work long hours
My organisation offers good flexible working practices but taking them up would jeopardise my career prospects
Working long hours is discouraged in this organisation
Working long hours is expected and accepted as part of the culture where I work
In this organisation it is difficult to work in ways that are different to the norm
My manager is sympathetic to my need to balance my work and life outside
If I was to take up flexible working options, I am concerned that my work colleagues would not be supportive
-100% -80% -60% -40% -20% 0% 20% 40% 60% 80% 100%
Strongly disagree
Disagree
Agree
Strongly agree

Source: IES Survey

5.1.1 Concerns about career progression

A common perception amongst employees interviewed was that having opted to work flexibly or reduce their hours, they would now be less likely to progress in their career than their peers working a standard 9 to 5 pattern. In particular, they believed they were less likely to be promoted to influential and senior positions. This statement from a female returner was echoed by many participants:

> *'I shan't be going back to full-time hours, and I know that this will put an end to any chance of serious promotion for me.'*

The responses from our small questionnaire survey illustrate the concerns of some employees. As shown in Figure 5.1, some respondents felt that career prospects would be reduced if they did not work long hours, or they took up flexible working options. This was a particular concern for those who were more career oriented, for example employees aiming for, or currently employed in, managerial or professional occupations. The survey data shows that respondents in managerial positions were more likely than other groups of staff to agree with the statements: *'if you want to progress in your career in this organisation, it is essential to work long hours'*, and *'my organisation offers good flexible working options, but taking them up would jeopardise my career prospects'*. Furthermore, there was a greater level of agreement with these

two statements amongst those who had actually taken up one or more work-life balance options, than those who had not taken up any. This may indicate that these respondents had actually experienced or perceived they had experienced such negative effects. However, it must be remembered that our survey sample was small so this analysis should be interpreted with caution.

On what are these beliefs based and what evidence is there that career prospects had actually been jeopardised as a result of taking up such work-life balance options? Many employees interviewed were of the view that 'getting on' depends more and more on *'being there, being seen, doing more than enough and doing it very successfully'*. A typical comment was:

> *'Those who make the decisions about whether and who to promote clearly value those who go the extra mile and stay in the office to deliver no matter what is going on at home.'*

This applied in all the organisations surveyed and was perceived to be manifest in a number of ways:

- Few senior managers worked reduced hours (our small survey showed that respondents who described themselves as managers, directors, supervisors and professionals were less likely to have taken up one or more of the work-life balance options (shown in Figure 4.1, page 34) than those who described themselves as specialists or staff).
- Few senior male managers leave 'on time', for example between 5 and 5.30pm, to fulfil family commitments.
- A concern that managers believe that *'you're no longer serious about your work and your future with the organisation'* if you want to reduce to four days (for example).
- A view that male employees tend not to take paternity leave in a block when their child is born and instead opt to stagger the remainder as single days off over an extended period.

These and other similar observations led many participants to believe that a condition for success and promotion is working standard, often extended, hours and that this is contraindicated by the flexibilities offered within work-life balance packages.

How might promotion prospects be jeopardised on a day to day basis? Participants working these hours identified two possible mechanisms:

- Their commitment to their job and to the organisation is questioned. For example:

  'It is no good having the policies if those taking advantage of them are then made to feel, however indirectly, that they are not participating fully in the organisation. For example, I feel very disadvantaged when I am the only one to be walking out of a meeting at 3pm to go and meet my son from school. I cannot escape the feeling that this is likely to reflect on how "committed" people consider I am to my job.'

- They may have fewer opportunities to demonstrate their suitability for promotion. Firstly, they may not be present in the office when the opportunity presents and so managers do not consider allocating it to them:

  'This is a version of out of sight is out of mind and it definitely works against us. So many things I could have run with to good advantage were given to others because the manager felt compelled to delegate it there and then and I wasn't there.'

Secondly, managers may feel unable to ask them to 'go the extra mile' by taking on extra un-scheduled work. Ironically, this was attributed to managers' respect for the individual's decision to reduce their hours.

As will be evident in the next chapter, managers recognised these dynamics and struggled to negotiate them fairly.

Organisational cultures

'Long hours cultures' were common within all the organisations. As shown in Figure 5.1 (page 46), the survey respondents were more likely to agree than disagree that a long hours culture existed where they worked. Accordingly, in spite of the value managers also put on 'outputs', employees feel pressurised to 'work my core hours and more'. They felt they were expected to 'be there' at the start of the working day and to remain as long as it takes to get the job done. They also felt obliged to do this on a consistent basis and in particular, when there were urgent priorities for the team or the organisation. The picture painted of a central office in a government department was similar: *'there is a culture of instant response, and instant and constant availability'.*

Managers and other employees described how long hours cultures are internalised and leave employees feeling guilty

when they work differently. Two respondents gave examples of this feeling of guilt.

> *'The team manager of professional staff will take a long lunch break to have her hair done. I will too .... We both know that we will both make up the time and taking that time out does not mean that the work doesn't get done. By contrast, a colleague is taking half a day's leave to have her hair done. In spite of the manager's example, she feels guilty about not being here.'*

> *'I started work at 7am this morning. I usually do, by 8am at the very latest. I was in an afternoon meeting at another site. As the meeting finished early I am home by 4.30. I am never usually home this early; I can't remember the last time I was. And I feel guilty that my colleagues are sat at their desks and will be for some hours to come. And it shocks me that I feel like this.'*

Few examples were cited where individuals were actually discriminated against because of their working pattern, but there was a perception that they would be. An example was also given in one organisation where staff believed a vacancy in a senior management position would not be open to part-time applicants. This in fact was not the case, but the rumour had pervaded the organisation and part-time employees we interviewed believed they should not apply for the position. The findings suggest that despite concerted efforts to change attitudes within organisations, organisational cultures, such as a long hours culture, are very difficult to break.

5.1.2 Lower quality and status of jobs

Employees commonly felt that jobs available to part-timers tended to be lower status and/or lower quality. This was despite the fact that a few of our survey respondents were part-time managers. The perception that part-time jobs tended to be of lower status was shared by all participants irrespective of their position (non/managerial) and their contracted hours (full or reduced time). For example, one respondent noted that:

> *'There is a cultural barrier; there are a lot of negative attitudes within the profession about the status of working part time.'*

One of the HR managers commented that a lot of progress had been made with redressing the gender balance. Now the glass ceiling for those who work part-time or take a career break needs to be addressed.

5.1.3 Workload pressures

Employees experienced additional pressures, relating to amount and intensity of their work. Among our participants, employees who had moved from working full-time to part-time seldom reported that their workloads had been reduced commensurate with their reduction in their hours. In addition, almost all noted that while their hours were reduced their administrative workloads were not:

> *'For example, I don't get half as many emails, I get the same number to deal with as when I was working full-time.'*

Participants frequently explained that they coped with these dynamics by working more than their contracted hours, sometimes away from the office, for example:

> *'Then I don't have to spend time when I'm there catching up with all the admin, etc., I can just get on with the job as soon as I get into the office.'*

> *'I end up working almost full-time, just not visibly in the office. I do it at home once the kids are in bed.'*

Consistent with these observations, managers reported that part-time workers' outputs are frequently similar to full-timers; there is no *necessary* reduction in either quantity or quality of their outputs as a result of their working reduced hours. The following observations about a part-time employee were typical:

> *'She produces almost exactly the same amount, of the same quality, as when she was working full-time. This is great for me; I get the same for less. But it worries me too. She feels she has to do this to prove that she's still as committed. On the other hand she opted to work reduced hours to better manage her domestic situation. She is not actually working less, she's working the same but in a different location,* ie *at home, and at a different time,* ie *when the kids are in bed. She's not being paid for it, and her access to other benefits are reduced. As well as that, I worry that it's not sustainable for her. Taking on more at home and taking on no less at work will burn her out for sure.'*

Employees working reduced hours also commented on the intensity of their working day and the pressure this put upon them. For instance:

'You feel that you've got so little time in which to get so much work done. You juggle constantly; dealing with incoming work as well as that required some way off. All the time you are desperate to finish everything off. You know you can't stay late to catch up or to deal with slippage.'

'I work 26 hours a week, in order to pick up my children from school. This makes my days very short, with real pressure to complete certain topics before I leave for the day. I think it makes me work fairly effectively, but it also puts me under a lot of strain.'

5.1.4 Cultural norms are excluding

Figure 5.1 (page 46)shows that some respondents agreed that it is difficult to work in ways that are different to the organisational norm. Participants working reduced or different hours gave examples of arrangements that were not responsive to their working patterns and so, in effect, excluded them. Arrangements for meetings were a case in point for many participants. Our participants reported that the scheduling of meetings tends to suit the dominant model (*eg* 9 to 5 plus extended hours). Public and private sector organisations participating in the research did not seem to differ in this respect. One respondent had the following complaint:

'At our last away day, we discussed how to address the long hours we work. It was agreed that meetings should not be arranged after 4pm. In practice, directors and senior managers still call meetings to start at 5.30 and with no notice. The same happened with the board meeting which followed the away day. The meeting lasted all afternoon and was still going on after 5.30pm.'

A number of participants singled out a second excluding behaviour; very late in the day or evening, senior managers requesting immediate action on an item for reporting the next day. Those who leave the office earlier either do not receive the request, or receive it later that night at home. Either way, they do not have sufficient time to deliver a quality response. We noted above the potential impact this could have on an individual's perceived commitment to the organisation and their potential for career progression.

5.1.5 Reactions of colleagues and managers

Figure 5.1 (page 46), shows that the respondents to the survey were fairly evenly divided into those who had concerns about the supportiveness of their colleagues, and those who did not. Some interviewees had experienced certain reactions from colleagues and managers which communicated a lack of acceptance for and understanding of working different or reduced hours. Snide or resentful comments about individuals' later starts, or earlier departures, such as 'what time do you call this?', 'having a day off then?' were noted by a number of interviewees. These attitudes were not confined to colleagues; some line managers' behaviours were also criticised. Types of behaviours mentioned included scheduling events and meetings at times when a part-time employee cannot attend and suggesting individuals' working hours patterns are inflexible or inconvenient. Communicated as observations, or humour, these reactions were experienced as undermining and short-sighted. A typical response from interviewees who worked reduced hours was:

> *'I work as hard as they do; frequently produce as much as they do and because of my reduced hours, am paid less and have less access to other perks. The last two in particular they conveniently forget.'*

5.1.6 Managers' people management capabilities

Most respondents felt that their manager was sympathetic to their work-life balance needs (see Figure 5.1, page 46) but some noted the difficulties managers experienced in implementing flexible working options. Managers' inability to deal effectively with some of the issues involved in working different or reduced hours, caused problems for some taking up these options. Inexperienced managers drew particular comments, as did older senior male managers. One of the employers had recently reorganised and many line managers were newly appointed and inexperienced. So far, they had received no training or guidance in introducing and implementing work-life options. They also had heavy workloads and large teams to manage. This created some difficulties for their staff. Similarly, some older managers were seen to demonstrate little understanding of the complex work and non-work demands facing many employees.

Participants shared a common concern about both these groups of managers; their experiences of life and work were so very different from their own that this would lead to the manager misunderstanding the need for and the benefits of better balance work and life options:

> *'... they never had to do it themselves or they weren't involved. Their housekeepers and wives did it all and they didn't see their children.'*

> *'They* [female managers] *had to make sacrifices when they were in my position, and those are the terms they use, "it was one or the other for men it wasn't possible to do both". ... They resent that I can do both, that I expect them to co-operate with me to do it and they couldn't when they were in a similar position.'*

5.2 Barriers to taking up work-life balance options

As employees weigh up the possibility of taking up work-life balance options, what factors prevent them taking them up? We report here the obstacles and concerns of the research participants. The previous section reviewed the difficulties experienced by those who take up the available options. Here we concentrate on the factors influencing those who decide not to. Of course, these are not separate issues. We found that some of the factors deciding employees against take-up were the difficulties experienced by their colleagues who had done so. In particular, concerns about the effect take-up would have on career prospects is off-putting for some. Additional factors preventing employees taking up the available options included:

- restrictions on the availability of, and access to, options
- knowledge of what is available and acceptable
- heavy workloads
- lack of supporting infrastructure and technology
- concerns about managers' reactions, and
- not being able to afford the options, if they result in a reduction in income.

These and other factors preventing take-up are described here.

5.2.1 Career prospects

For those who could afford financially to work reduced hours, the fear that their progression would be jeopardised was the factor which more than any other decided them against taking up work-life balance options. A manager explained a commonly held view:

> *'It is expected that you have to give up your home life to get on. This is the biggest problem with all of the rhetoric about the work-life balance. Until this concern is addressed, no better balance will be achieved, here or anywhere else.'*

Some felt that even enquiring about flexible working options would reflect badly on their commitment to their career and employer. This caused acute concern for a significant minority of participants and prevented them from taking advantage of all types of flexible working options available to them. For example,

> *'Even when leaving early is a one-off kind of reward from my manager, I still worry about leaving the office ahead of the others. ... Even though I know and my manager knows I've done my bit, and more, I still fear the consequences! My worry is that it will count against me somehow.'*

5.2.2 Restrictions on availability of options

In the participating organisations, access to some work-life balance options was conditional on length of service, grade or location, and, in some cases, on a number of conditions (These were summarised in Chapter 3). At one employer for example, only employees above a certain grade have access to leave arrangements such as career breaks and sabbaticals.

Certain types of posts are less likely than others to be made available to working different or reduced hours. In particular, posts that are senior and/or critical are unlikely to offer reduced hours (for example). Within a government department for instance, working with, or in close proximity to, ministers was considered incompatible with taking up work-life balance options; *'that's where the rhetoric can really fall down'*. Typically in these critical positions, hours are long, pressures are considerable and staff feel that they should be present and available when the minister is physically in the department:

'It is a brave person who will say to Ministers 'I didn't get the submission done because I had worked my contracted hours and my work-life balance comes first.'

We noted in Chapter 3 that many of the participating employers would consider a wide range of flexible working options as long as they fitted with business needs. Nonetheless, a number of issues were raised in relation to being able to match these needs. In roles which require continuity of cover, for example IT support roles, it is sometimes perceived to be difficult if not impossible to work different or reduced hours. Term-time working was identified as particularly difficult in these instances, as the work does not stop during the school holidays. In one organisation where shifts were worked, it was difficult to staff the afternoon shift. Therefore when individuals want to change their hours to take afternoons off, this can be difficult. Potential job sharers reported that it can be difficult to find a job-share partner with the right skills and qualifications who can work the other half of the week.

Policies offering different or reduced hours working may not be adhered to and supported throughout the organisation. We found access can be limited by managers who believe that flexible working options cannot work, for example because in their view personal cover is required at all times. They also view alternative ways of working unfavourably. A further more perverse finding was that following the formalisation of a work-life policy, in some cases informal flexibility offered by individual managers had reduced. For instance, service managers found it more difficult to informally reward their team members' performance and commitment with occasional leave (such as finishing half an hour early).

5.2.3 Knowledge about options available

Employees were sometimes unaware of the work-life balance options available within their organisations. They were more familiar with the more common forms of flexible working; part-time, flexi-time, job shares and staggered starting and finishing times. They were less familiar with options such as compressed working weeks, nine day fortnights, and annualised hours. In addition, employees were sometimes aware of the work-life balance options available within their organisations, but convinced, wrongly, that they did not have access to them:

'It wouldn't occur to me to ask to condense my hours because I would have thought it was just a strict "no" for me.'

These uncertainties were further compounded; the work-life balance options had frequently not been well publicised and, related to this, line managers' knowledge of the options and how they would work was also sometimes limited. Promotional periods, or events, during which employees were given time off work to hear about, and discuss, the various options were rare. Also, the language used in written advertisements was frequently obscure:

'Staff are not used to the jargon, like dependency leave. This means that they don't recognise "lifestyle options" for what they are, taking time off to spend more time with your kids.'

We interviewed a number of employees who lacked knowledge about their employers' work-life balance policies. At one employer for example, all advertised posts were open to part-time workers, unless stated otherwise. However, some employees reported that they only felt able to apply for jobs on a part-time basis, when it was explicitly stated the post was open to part-time hours. Managers noted that these concerns can encourage individuals wishing to work part time not to disclose this in their job application. Instead they request an hours reduction at a later stage in the recruitment and negotiation process.

A further issue identified was that even where individuals were well informed of the work-life balance policy, they lacked knowledge of what would be acceptable or permissible for themselves. This was because in many cases, identifying solutions to individual work-life balance needs relied on the individual putting in a request for a proposed working pattern. As we noted in Chapter 3, individuals were expected to devise their own creative solutions which would fit business needs. Many respondents felt that staff would have difficulty doing this and as such, there seems to be some conflict here. Such policies aim to allow for flexibility, in that people can work the pattern they would like, as long as their work allows and their line manager agrees. In practice however, if a particular pattern is not written down, many people do not think of asking for it, or they do not think it would be permissible. This was thought to be a particular problem for more junior or inexperienced employees, who were less likely to have a good understanding of the business

or the confidence to request a certain option. Furthermore, some staff felt less able to take on this responsibility, were reluctant to take risks and had a tendency to do things as they had always been done.

5.2.4 Fear of managers' reactions

Related to the points above, the reactions employees anticipate from their managers and/or their difficulties in negotiating their interests can limit their take-up of work-life balance options. Figure 5.1 (page 46) shows that most survey respondents felt their manager would be sympathetic to their work-life balance needs. Nonetheless, this did appear to be a problem for some of our interviewees, for example sales assistants in the retail sector, as one manager explained:

> *'Some may find it difficult to ask for help, they may feel that their concerns are "silly little things" and may be nervous of asking, worried that they may be refused.'*

Among our participants, these experiences were mainly described by lower grade staff. For example, an office junior wanted to help her child settle into a new school. Rather than ask her manager to start and finish at different times for that period, she felt she had to take a half day's leave on each occasion. Her fear was that her manager would be unhappy with her for asking:

> *'He will refuse and then treat me unpleasantly just because I asked, I know he will.'*

Quite a different approach was described by the majority of managers taking part in our study, however. This suggests that these fears may well be unfounded. Managers described encouraging team members to anticipate and plan for external circumstances impinging on work. For example:

> *'... this is what I see as working responsibly and constructively. I was horrified to learn that people are frightened of asking. That's no way to encourage good performance.'*

5.2.5 Workload pressures

Workload pressures also prevented some individuals from considering taking up work-life balance options. They simply felt the pressure of work would not allow it. An example of this was

in one organisation experiencing staff shortages and high staff turnover. It was reported that departmental managers would not be able to resource their departments if more people took time off. In a department of another organisation where flexi-time was worked, it was reported that workloads had been very high for the previous nine months and showed no sign of declining. This meant staff were finding it increasingly difficult to get the work done in normal hours. Therefore, some were building up flexi-time and were unable to take the time off to compensate.

When considering reduced hours, some office workers were concerned that their workload would not reduce in proportion to their hours reduction. We noted above that this kind of problem had occurred amongst those working shorter weeks. A further concern raised was the effect taking up flexible working options would have on their colleagues' workloads. Some respondents said they would feel guilty about increasing the burden on co-workers, and others noted that they were worried colleagues would resent them for it.

5.2.6 Inadequate infrastructure and technology

A number of our participants noted that an increase in numbers of staff working reduced or different hours has implications for workplace infrastructure and communications systems. Additional car parking spaces, computers, desks, *etc.* may be required, if the total headcount is to increase. Restrictions on access to computer networks and a lack of lap top computers can prevent people from working from home:

> *'If I've got a report to write, I prefer to do it at home. There are fewer interruptions and distractions, and so I can do it quicker. That's the business case; my increased speed. I would go so far as to say I can do them in half the time it would take me in the office. Would the company support me by buying a laptop? No.'*

Participants were aware that without adequate technology and infrastructure, an upper limit to the proportion of the workforce able to work flexibly could quickly be reached. Against this, we found no examples of this 'ceiling' being planned for, or proactively managed. Rather, access was typically reported to be on a 'first come, first served' basis.

5.2.7 Financial consequences

The financial consequences of work-life balance options precluded some employees from considering them and from taking them up. These were lower paid workers, those in single income households, and those who are both low paid and sole earners. This finding is consistent with other IES and US research. Holcomb (2000) and the Families and Work Institute in the US found that low wage workers were (for example) three times less likely to get company-sponsored tax breaks to help pay for child care. They are also less likely to earn sufficient money to afford to contribute to the childcare sponsored by their company. Similarly, IES cross-sectoral case study research recently suggested that one of the reasons that take-up of parental leave has to date been low is that it is not paid for (Bevan *et al.*, 2001). An IRS survey (2000, p.14) reached the same conclusion.

Particular sub-groups had specific observations to make; these included parents and older workers. Among our focus group participants, low pay made it impossible for some to consider working in ways that would reduce their income, for example reduced hours or unpaid leave. A retail manager explained that some sales assistants:

> *'Simply can't afford to take the thirteen weeks unpaid leave because it is exactly that, unpaid. It's great in principle but it's no use to them as they cannot afford it.'*

For their part, older participants were concerned about the impact of work-life balance options on their pensions, and their managers shared this concern. Those in final salary schemes in particular, were prevented from considering options which would involve reducing their hours:

> *'I would like to reduce my hours, but as my pension is based on my final salary, it would be silly to do so. If the employees didn't lose so much pension by retiring early, more people would be able to enjoy life outside, possibly take up educational courses and make contributions in other ways.'*

5.3 Conclusion

Our findings suggest that even when employers offer the types of flexible working options employees demand, there is a gap

between what is on offer and what is taken up. Observed difficulties experienced by those who have taken up such options, mean the options become less attractive for others. The consequences for their progress within the organisation and career was a key concern. On taking up flexible working practices, participants believed that their performance was, or would be, less well regarded and their progress jeopardised. Thus, the implicit deal on offer within organisations was described as 'either, or'; either you can have a balanced work and life or you may progress'. This was evident in both private and public sectors:

Other aspects of take-up which presented difficulties included:

- their commitment and credibility being questioned
- the pressures associated with working reduced hours, *eg* no commensurate reduction in performance targets and workload
- the lower status of working part-time or reduced hours working
- organisational norms being excluding, *eg* 5pm meetings, evening requests for action by 9am the next morning, and
- managers' and colleagues' lack of appreciation of and resentment at unfamiliar working patterns.

Further obstacles which were having the effect of deciding people against taking up work-life balance and flexible working options were:

- restrictions on availability of the option due to grade, length of service *etc.*
- occupying 'critical' posts
- working in a support function
- problems communicating the available options
- concerns about workload
- lack of supporting technology and infrastructure
- fears about line managers' reactions, and
- not being able to afford a reduction in pay.

6. Difficulties for Line Managers and Co-Workers

When employees take up work-life balance options, do their managers and co-workers experience difficulties and, if they do, what exactly is difficult? The findings in relation to this question are reported here. Together with the previous chapter, these discussions help explain the 'take-up gap' we observed in the participating organisations (see Chapter 4).

We report results of our discussions with managers and co-workers and relate these, where relevant, to their responses to our attitude survey and to observations from other studies and commentators.

6.1 Difficulties for line managers

Almost all managers interviewed believed that the balance between work and life should be healthy and positive, and were keen that this principle should apply to all employees (and not be confined to those with caring responsibilities). However, the majority experienced a number of difficulties as they tried to make these principles a reality. Indeed, they clearly described their sizeable and lonely struggles putting the principle into practice. The more uncomfortable difficulties are detailed below first.

6.1.1 Responsibility, discretion and support

Managers had two issues relating to responsibility. The first was the question of whether and what responsibility the employer has for balancing employees' work and home lives. For example,

a minority questioned whether employers have *any* such responsibility (or conversely, whether the responsibility is entirely the employee's).

> *'Are employees' domestic circumstances the responsibility of their employer? Is it my responsibility how they keep it all on track or not?'*

The second issue was more commonly expressed. It related to managers' ambivalence about their responsibility for implementing the organisation's work-life balance policies. In several organisations, this had been left largely to them, and they had mixed feelings about it. On the one hand, they welcomed the discretion and autonomy of making decisions about their team. On the other, they felt abandoned with the policy, and unsupported by HR *'the supposed people people'* in solving the problems relating to its implementation. The views expressed here by a public sector manager were typical:

> *'I know that I can prevent an individual being able to take up a work-life balance option, and I feel mixed about that. I know I'm in a good position to judge, and I don't want to be unfair or discriminatory but with the system as it is, I know I can be. I know also I can use it as a means of keeping someone, or not, as I see fit. I'm not sure that that's a fair responsibility for me to carry. I worry about being accused of being unfair or discriminatory, and the publication of the policy has only increased the pressure to be transparent and consistent, but that's difficult when individuals' personal circumstances are so different.'*

6.1.2 Lacking guidance

In both public and private sectors, there were examples of policies being introduced with no implementation guidance for line managers. Some had received no more information about the available options than employees.

> *'It's fine, it's right, but there is no guidance about how we should do this, or how we should manage its implications within the team.'*

In the following sections we discuss a number of issues line managers noted that they were facing. It is on these issues they would have liked more guidance.

6.1.3 Deciding access

Deciding employees' access to work-life balance options was a particular area in which line managers felt they had insufficient or inappropriate guidance. Ensuring that their decision-making was fair presented the biggest challenge and in this respect, the following three situations were particularly difficult.

- Issues relating to skill and/or knowledge substitution and workloads:

  'Within the team, [employee X] has some unique skills. This means that I cannot re-allocate some of his workload to the others. So if I agree to him working reduced hours, I will have to take on the more tricky bits. I have more than enough on. In principle, I want to support him but in practice, I can barely manage my existing workload without having to take on the more difficult bits of his.'

- Differing interests in retaining team members:

  'I want to be fair but there is no getting away from it that while I agreed to nine day fortnights for [employee Y] who otherwise I would have lost, I am not inclined to agree to [employee Z] having the same.'

- Issues relating to the implicit conditions for progress:

  'To be promoted here you have to be seen to do that bit extra. I don't feel comfortable asking those who have opted to work reduced hours to do that bit extra; it seems contrary to their decision. But if I don't ask them, I am precluding them from an opportunity to show that they can and will do more and that they are fit for promotion.'

6.1.4 Uncertainty about the end result

A critical difficulty for managers was that they were unclear about the end result, *ie* of what *'a life balanced with work would look like'*:

> *'What are we aiming for? What will it look like, for the team members, for me as an individual, and how will we know when we've achieved it?'*

The problem for some was that they had no concrete examples to refer to from their own working lives, and so they found it difficult to know what they and their employees were aiming for.

This meant that in spite of supporting the principle, some line managers had some reservations about promoting it in practice.

6.1.5 Managing workloads, resources and sustainability

One of the common arguments against introducing work-life policies is that they will lead to staff shortages at key times; none of the managers we interviewed identified this as a difficulty. There was, however, a view amongst some managers that take-up of work-life balance initiatives made worse existing difficulties with excessive workloads and limited resources. The distinction here is subtle but important. Managers reported that implementing work-life balance policies did not *create* difficulties with workloads and resources, *but* where these difficulties already existed (*eg* through inadequate workload management, or a critical mass of vacant posts), these were exacerbated by employees (including managers) taking up the options. It should be noted that this concern was not shared by all managers, and seemed to depend to some extent on their own attitudes to work-life balance and management capabilities.

Managers frequently described the difficulties of managing heavy workloads within the team, and in some cases staff shortages. In relation to this they described a number of specific difficulties with implementing work-life balance policies and practices.

- Being required to manage competing pressures. On the one hand, managers are expected to achieve more with fewer resources. On the other, they are required to enable team members to balance their work with their lives outside, for example by working a reduced number of hours. Negotiating these competing pressures was an on-going struggle for many.

  'Two of my team have each reduced their hours by ten per cent. This has stretched us even further than we were, which was no joke. As manager I have absorbed some of their work, but I'm not sure how long I can sustain it. On the current level of resourcing we can't get an extra member of staff to cover the 20 per cent reduction in hours. Should anyone else want to do the same we would really struggle, me in particular.'

  In the public services, particular frustration was directed at central government, as this quotation illustrated:

'There has been no proportionate increase in our budget from central government for manpower to back up the increases in planned leave. How are we supposed to deliver?'

- The principle that access should be equitable (which many believe) will be compromised if requests to work reduced hours continue to be dealt with on a 'first come, first served' basis. Thus, managers nervously anticipated the following scenario. If more employees take up options to work reduced hours then, at some point, the team will not be able to absorb their workload and will fail to deliver on targets. At this point, other team members will be precluded from taking up the same option. Managers dreaded having to deal with employees' resentment at their not having access equitable to their co-workers. They wanted guidance on two questions; firstly, what are the alternatives 'to first come first served' for dealing with requests and secondly, how can they ensure that all team members have fair access to work-life balance options?
- With regard to managing employees in roles and functions considered to preclude flexible working options (*eg* key IT support roles) managers needed guidance on a number of questions:

  'If I can't give them the same flexibilities, how should I demonstrate that I value employees in these positions? How also should I encourage them to improve the balance of their work and their lives? How also should I manage their resentment at other colleagues' greater access?'

- Estimating a reduced workload to match a reduction in hours, was a further problem. While most supported the principle that employees opting to work reduced hours should have their workload reduced in parallel, they found this difficult to assess and implement:

  'It seems odd to say it, but I find it more difficult to judge an appropriate workload for someone working part-time. It is as if by default or osmosis I believe I know what an appropriate full-time workload is. With someone now working different hours I'm finding my assumption challenged.'

- Managers were also concerned about the potential loss of their posts from within their teams:

  'We are still delivering on our targets even though more and more of them are working reduced hours. Given that we've done this, at the next review of resources, this will be used to argue for a cut in posts. Then my capacity to realise our objective will be compromised, and so will my bonus!!'

6.1.6 Exploring new ways of working per se

As more employees take up work-life balance options and resourcing remains unchanged, managers reported having to explore new ways of working. Managers described having to be innovative in re-organising work roles and systems in order to achieve the same quality and volume of work. Where this had been successful, managers felt that their courage and their preparedness to respect and talk to staff with staff were critical factors.

6.1.7 Concern about their own capabilities

Whilst almost all managers supported the work-life balance principle, they believed that actually making it happen in practice demands more of them. They reported finding it more difficult to monitor attendance and performance, and provide training and development opportunities. Managing job sharers was another new demand experienced by several managers. Rewarding their performance, for example, presented perplexing issues, as did managing their colleagues' cover on the (infrequent) occasions it was necessary.

Two areas have been found to be particularly problematic:

- Some line managers do not have the people skills needed to build understanding and trusting relationships with employees, which they recognise as critical for successful flexible working.
- Line managers can feel undermined by employees working at different times and locations from them. They can feel their personal control is reduced and experience this as stressful.

  'Managing a fragmented workforce is much more difficult than managing one that's where you are all the time that you're there.'

6.1.8 Confusion about line managers' and HR responsibilities

Respondents often reported that day to day working relations between HR and line managers were complex and of variable quality. This can mean that:

'... employees are batted back and forth between us and HR, getting none the wiser as they go. Inevitably this dissuades them from pursuing their interest in better balanced working.'

Briefly, participants characterised the dynamics as follows:

- Line managers have multiple, competing priorities. They are confused about and ill-prepared for dealing with the people issues that are newly devolved to them. Some are uninterested and passively resist managing the issue. Others want support from HR and feel frustrated that it is not more accessible.
- HR staffing levels have been cut so they have reduced capacity to provide the amount and the continuity of input some line managers need. As they move into a more strategic role, they are being removed from day to day operations. Some are concerned that they may be less well prepared to respond to line managers' issues.

This was a relatively ubiquitous picture of dynamics between HR and line managers.

6.1.9 Lack of support from senior managers

Lack of support from senior managers was noted as a problem by some line managers. Senior managers were reported *to 'pay lip service to the work-life balance principle, but that's where their support starts and ends'*. A typical complaint was:

'They're great at writing it into policies, putting it into practice is another matter.'

Behaviours such as continuing to set very tight deadlines, or deadlines that necessarily involved weekend or evening working were noted. It was also felt that managers should more visibly support work-life balance policy through their own working patterns. Senior staff who championed the work-life balance policies came in for criticism when their behaviour contradicted their support for the principle. The following comments provide examples of this view.

'One Friday afternoon, a senior manager gave a talk to junior grades on the company's fast track scheme about the importance of work-life balance. Fittingly, he said he was leaving early that day and he did, but he took with him a bundle of work to do at home over the weekend.'

'Our work-life balance champion does leave early sometimes, for example when his elder child had a birthday party – but he took work with him to finish off later that evening. He is also known to compete in the informal discussions about who worked most hours over the weekend. It undermines everything's he's been telling us.'

'I used to have a manager who worked regularly until 8pm. If he was working late, I felt I ought to as well. My current manager leaves when he has had enough, even if that's 4.30pm. This makes it a lot easier for me to leave at 5pm; this is time enough for me to do my work and for my relationship with work to be healthy.'

Such behaviours cause two difficulties for managers. Firstly, like all other employees, they receive mixed messages; the policy gives them one message and the most influential individuals within the organisation give them an opposite one:

'What they're telling us by their behaviour, as well as what some of them say, is you won't succeed here if you have a healthy work-life balance.'

For managers there is a second difficulty. Team members often question them about the rationale for, the implications of, and the commitment to the policy within the organisation. Faced with these queries, managers felt it would be useful to point to a successful member of staff 'who walks the talk' or who has had a successful career while working an alternative or flexible pattern. Such role models were often reported as lacking. Where they did exist, some respondents felt they were unrealistic, very difficult to live up to and could actually have a damaging effect. An example was given of a part-time senior manager, who had been held up as a role model. However, it was widely known the individual worked considerably longer than her contracted hours. For this reason the role model was not taken seriously by staff.

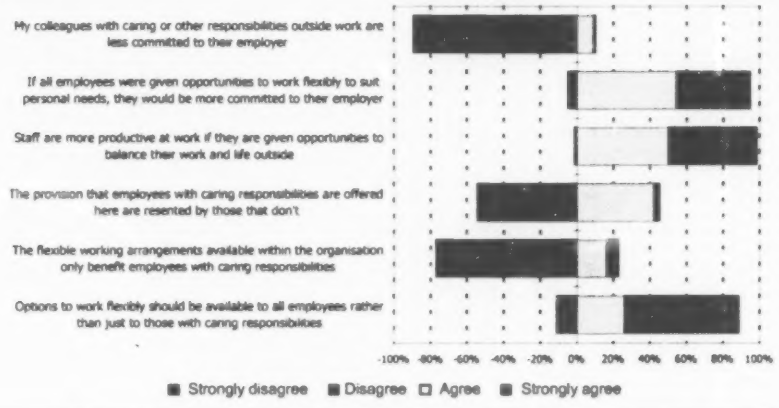
There were, however, signs that these dynamics were slowly starting to change within the case study organisations. There was reportedly a significant minority of senior managers who worked reduced hours or from home on occasion, or who supported job sharers. Participants welcomed the possibilities suggested by these behaviours, as well as their implicit support for the principle of a healthy work-life balance. Indeed, many were evidently relieved by the actions of these senior staff; as one manager explained:

'At last there are signs that it might be possible to pursue a career here and be part-time.'

6.2 Difficulties for co-workers

Concerns about a possible 'backlash' on the part of co-workers against those working reduced or different hours has been widely reported in the press. The Work-Life Balance 2000 survey conducted for the Department for Education found that employees were less concerned than employers about any potential unfairness arising from work-life balance practices. In this survey a quarter of employees thought that work-life balance practices were unfair to people like them, compared with 43 per cent of employers who thought such practices were unfair to some staff (Hogarth *et al.*, 2001). Similarly, a minority of our survey respondents (see Figure 6.1) felt that there might be some resentment about the flexibilities on offer from staff without caring responsibilities. In this section, we discuss some of the difficulties co-workers of people who had taken up the practices had experienced. It should be noted at the outset, however, that these were experienced by only a minority of research participants. As indicated by the survey findings, most were supportive of their colleagues' needs and wishes. Figure 6.1

Figure 6.1: Views about employees taking up work-life balance and flexible working options


My colleagues with caring or other responsibilities outside work are less committed to their employer
If all employees were given opportunities to work flexibly to suit personal needs, they would be more committed to their employer
Staff are more productive at work if they are given opportunities to balance their work and life outside
The provision that employees with caring responsibilities are offered here are resented by those that don't
The flexible working arrangements available within the organisation only benefit employees with caring responsibilities
Options to work flexibly should be available to all employees rather than just to those with caring responsibilities
-100% -80% -60% -40% -20% 0% 20% 40% 60% 80% 100%
Strongly disagree
Disagree
Agree
Strongly agree

Source: IES Survey

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shows that the large majority of staff responding to the small survey were supportive of colleagues taking up work-life balance options, recognising that this can improve performance and commitment. They were also largely in agreement that work-life balance is for all, not just those with caring responsibilities. Moreover, there were no differences in these responses between those who had taken up one or more flexible working options and those who had not. This suggests that those surveyed were generally supportive of their colleagues' work-life balance needs and working patterns. Nonetheless, a few concerns were raised during the focus group discussions, and we discuss these here.

6.2.1 Resentment at being left 'carrying the can'

A few employees interviewed who were working closely with a colleague or for a manager working reduced hours or from home expressed some resentment. The focus of their resentment mostly related to covering for others while they were out of the office. For example:

> *'I do resent being left in the office, to hold the fort and carry the can while they're off doing whatever.'*

> *'Those without family responsibilities end up covering for those that have. An old boss had to leave at 5 to pick up kids, leaving me with instructions to fax him work at home once done. So I was the mug left in the office. There was no give and take. His family came first no question and I was expected to fit around it. It made me mad!'*

Their colleagues' absence had two effects. Firstly, it increased pressure on them to maintain a presence at work and to deliver on targets. This pressure sometimes came directly from managers and sometimes from the individual's sense of responsibility for the organisation's goals. Secondly, they resented the 'fact' that they had made a greater contribution to achieving these goals; this they calculated on the basis that they had been in the office for longer.

Individuals working flexibly or reduced hours also had some concerns themselves about the impact this had on their colleagues. One respondent had found a way round this issue, but still had reservations:

'I currently work four days a week. I have a very good assistant that covers for me the day that I am not here, and she receives an allowance to do this - I did not think it fair that someone should cover for me at the higher grade and not get paid for it. The system works well for us, but I am not entirely sure that managers here are particularly happy with it.'

To some extent the resentment felt by co-workers was tempered by the reasons for the flexible working arrangements, *ie* some reasons were seen as more valid than others. Essentially, caring responsibilities, and in particular child care, were regarded as the most valid reason for working reduced or different hours, and the source of the least resentment. Leisure or other intellectual or career interests were the least valid reasons for leave and the source of most resentment. A few employees were not supportive of the principle that work-life balance and flexible working options were available to all regardless of the reason. For example:

'Illness and childbirth are legitimate. Having a business to run in Cairo is not. Grandchildren are not. There does have to be limits, but where to draw them is difficult.'

Particularly acute resentment was expressed towards two groups. The first was more senior staff due to the greater access they have to a wider range of benefits. This applied to formal and informal flexibilities. Career breaks for the purpose of going travelling were commonly the subject of particular bad feeling. On the other hand, female employees resent the perceived belief that maternity and child care benefits are sufficient benefit and they are not entitled to further benefits:

'Just about acceptable I want to have kids, or have to look after someone who's sick, but if I want to do anything else then I can either forget it or pay a high price.'

We found that a few employees without children and/or caring responsibilities can perceive a lack of parity in their leave entitlements and other benefits. That is, those without children sometimes feel that they lack comparable consideration and treatment, and that they necessarily contribute more than these co-workers.

6.2.2 Mis-use and mis-management of flexibilities

There were some concerns expressed about a very small minority of staff who were perceived to be taking advantage of the flexibilities on offer. This mostly related to informal flexibilities. There were concerns about colleagues not contributing equally or showing commitment to the organisation or their team. For example:

> *'The big danger is the perception that people with family responsibilities in particular can always argue that they need to leave early etc. This may leave other staff to carry the can. Very much depends on individuals' attitudes. Some are very focused and realistic about what they can do in the time they are in the office. Others seem uncommitted or do not appear to take responsibility for leaving other people in the lurch.'*

Some managers were criticised for their responses to misuse or abuse of the flexibilities on offer. Rather than deal with the performance of the individual who had misused them, several participants reported managers taking *'the privilege'* of informal flexibilities away from the whole team.

6.2.3 Adjusting to new working arrangements

Co-workers also experienced practical difficulties adjusting to their colleagues' different working arrangements. Where flexible working is uncommon, it can take some time to adjust to knowing when and how to access colleagues. The difficulty here is not actually gaining access to the individual, but in becoming familiar with different norms relating to communication. Additionally, when timetabling joint work, it can be difficult learning to estimate what colleagues working reduced hours will produce within the same time-scale. The issue here is not with the working practice *per se* but with the time and effort required to adjust to it, as when any change is made to established working practices.

6.3 Conclusion

Managers and co-workers do experience difficulties when colleagues take up work-life balance options. These are different for the two groups.

The biggest difficulty for line managers is the lack of guidance they have had in implementing work-life balance policies. In particular, they want guidance to help them:

- decide who has access, and how to be fair to all those they manage. This is a particular issue for managers of support staff (including IT, administration, reception) whose access to work-life balance options is more restricted than other groups.
- deliver on targets and secure bonuses with reduced or differently organised resources.

Other major difficulties managers are struggling with include:

- Senior staff's lack of visible support for the work-life balance principle and policy, resulting in a mixed message about its acceptability and about how to be successful in the organisation.
- Ambivalence and/or a lack of clarity about roles and responsibilities for implementing the policy in the relationship between line managers and HR.
- Their own capabilities to manage the 'people side' of implementing the policies (*eg* their negotiation skills) and to re-design work patterns and roles successfully.

Co-workers in the organisations surveyed were largely supportive of employees taking up flexible working options. However, we did identify some cases of resentment. The main issue was that the colleagues working away from the office, or with reduced hours can have the effect of increasing the pressures on those remaining at work. Those remaining felt they necessarily made a bigger contribution than those working reduced hours. Adapting to colleagues' new ways of working also presented a challenge to some.

If the benefits of work-life balance options we described in Chapter 3 are to be realised, these are not insignificant difficulties. In the next chapter we discuss them further and propose some potential ways forward.

7. Issues Arising from the Research

In this final chapter, we consider the key findings and issues arising from the research. Issues to be addressed and key aspects of successful implementation are also discussed.

7.1 Headline findings of the research

In the six organisations we studied, we found a complex picture surrounding the status of work-life balance initiatives.

- There was considerable support for the principle of a better balanced work and life, as defined in Chapter 1. This support was not just confined to employees. There appeared to be a critical mass of senior managers who supported the principle.
- Further, those supporting the principle were keen that it extended to all employees. There was a desire that all employees are included, and provision not confined to those with children, women, or those occupying senior positions.
- Moreover, participants were interested in parity, and not necessarily in equality. They discussed their interests not in terms of 'everyone having access to *the same*' but in terms of 'everyone having access to *some*'. In terms of understanding the future of work-life balance initiatives, and their potential costs, this may be important. The guiding principle in most cases was that requests from individuals to take up flexible working options were granted where they fitted with operational requirements. Participants recognised that not everyone can take a career break after three years (for example) but they felt strongly that everyone should be able to limit the intrusiveness of work on their lives outside (*eg* by enabling more flexibility around starting and finishing times to avoid traffic congestion).

- A number of business benefits of the work-life balance principle have been cited in previous research and literature, for example in terms of improved commitment, productivity, retention and sickness levels. We found instances in which such benefits were being realised. That is, individuals we spoke to, and their senior managers, cited tangible instances in which both individuals and their organisations were seen to be benefiting from taking up work-life balance initiatives.
- Quantitative data relating to the costs and benefits of work-life balance initiatives, and their take-up, were not readily available in the organisations visited. It would appear that the employers were not collecting the data they would need to systematically monitor take-up and evaluate the costs and benefits of initiatives.
- This study in its use of in-depth qualitative interviews was able to explore subtle, and sometimes complex organisational processes and dynamics around take-up of work-life balance options.
- Levels of take-up of work-life balance options did not appear commensurate with the level of latent demand from employees and interest in work-life balance options. We called this 'the take-up gap'. It is important to stress that we observed this in organisations known internally and externally to be promoting the work-life balance agenda. We discuss this issue in full below.
- Line managers had a key role in the implementation of work-life balance initiatives within the organisations. This presented some line managers with some difficult issues. Many felt the guidance they had received in order to help them with this had so far been lacking.
- A few immediate co-workers did resent 'being left carrying the can' and 'doing more for longer' than colleagues working reduced hours. This was in spite of their recognising the pressures on those working different or reduced hours.
- The gap between the work-life balance principle and employment and management practice was in some cases considerable. Formal and informal restrictions on the groups of employees that can apply for the available options are not insignificant. Instances in which policy was not adhered to were also identified. Some managers were criticised for their behaviours which were not supportive of the work-life balance principle, *ie* they were not 'walking the talk'.

7.2 The current status of implementation of work-life balance polices and practices

The findings suggest that in general, implementation practice within organisations is not necessarily resulting in better balanced lives. For example, some individuals who had opted to work reduced hours had actually continued to work full-time, and in some cases extended hours. This can be explained by the following combination of factors:

- The workloads of employees are not necessarily reduced. Managers find workloads for flexible workers difficult to estimate and in today's highly competitive environments are pressurised to produce the same outputs (if not achieve more with less).
- The commitment and performance of staff taking up flexible working options is sometimes questioned by peers and managers. Putting in less hours is equated with contributing less.
- Individuals feel pressurised to produce the same level of output, despite the fact they may have reduced their working hours.

7.2.1 Obstacles employees experience

Our analysis suggested that the work-life balance 'take-up gap' can largely be explained by the following factors:

- There is organisational level, cultural resistance to change. Participants saw this as coming mainly from senior managers but also from some middle managers. Senior managers themselves are possibly unaware of, or under-estimate, the influence of their behaviour in shaping subordinates' understanding of their working environment and the values of the organisation. Senior staff are associated with role models of success. Thus their disregard for, or lack of interest in work-life balance principles 'sets the standard'. Individuals come to believe that a balanced life is antithetical to success in the organisation, and fear that taking up work-life balance options automatically compromises their career progression.
- It is line managers who generally have 'been left' to make the work-life balance policy happen, or not, and with little guidance they are struggling. We found some examples of inconsistencies in the way in which policies are interpreted and implemented. Contributory factors included on-going confusions about the roles and responsibilities of line managers and HR practitioners;

and a lack of support for managers dealing with difficult issues about access and parity.

- Neither availability nor access to work-life balance are equitable, and this has the potential to cause resentment amongst employees. We found that, by and large, managers accept employees' caring responsibilities as a valid reason for working flexibly. They are most prepared to consider the needs and interests of 'key' groups of staff and those most difficult to replace. Lower grade staff often have access to fewer and/or lower grade options. They are also least able to afford the income reduction of any unpaid flexibility.

7.3 Issues to be addressed

If the benefits of work-life balance policies are to be more widely realised, and *if* the employees, co-workers and managers are to overcome the difficulties they experience in implementing work-life balance initiatives, then there are some issues to be addressed.

- 'The deal' on offer from employers was widely characterised by our research participants as *'either you can be successful here, or you can have a more balanced work and life'*. It continues to be weighted towards employers; and is by no means as transactional as some work-life balance proponents suggest. This has two implications. Firstly it means that work-life balance initiatives are appearing in a relatively antipathetic environment. Secondly, in this context, credibility of work-life balance policies can be questioned.
- Commitment to work-life balance objectives seems patchy, especially among more senior staff. There is a lack of clarity about:
  - what initiatives can achieve
  - for whom, and
  - how that might enhance commitment and outputs, and limit distractions.
  - In addition, clarifying senior executives' significance to, and responsibility in, determining organisational norms and culture may be pivotal.
- The responsibility for implementing work-life balance policies largely falls on line managers. It is their decision as to whether or not a request for flexible working meets business needs.

Many feel ambivalent about their discretion and autonomy. It was also recognised that managing staff working in flexible ways presents new challenges for managers and requires them to think differently about staffing patterns.

- Policy statements and day to day practice send different messages; this creates confusion and can lead to resentment.
- It is unclear whether or not all employees should expect to benefit from work-life balance initiatives. This depends on operational needs. Many employees have been led to, and/or want to, believe that they will. The limited take-up observed to date means that some are frustrated they have not benefited directly. With the level of interest we have seen in more flexibility at work, it may now be easier to think more creatively about how to improve the work-life balance of all employees; for example, by sanctioning wider deployment of occasional and informal flexibilities.
- Input continues to be valued over output and quality. Constant availability and instant response are valued. Long hours are valued. Presenteeism is reinforced. All of these values persist and serve to limit the uptake of, and realisation of the (business and individual) benefits from work-life balance initiatives.

7.4 Key aspects of successful implementation

The participants of the research identified the following practices as important in order to ensure successful implementation of work-life balance practices. It was felt that these would help to improve take-up.

Listen to staff to find out about their work-life balance needs, through for example, annual staff surveys and focus groups or discussion forums.

Effective communication about the policies on offer to the right people at the right time to provide a clear message that there is a commitment to addressing the issues, through for example good practice and success stories spread through the intranet and bulletin boards.

Senior managers' behaviours need to be adjusted to set an example and to break down perceptions that people who work fewer hours are less committed and less important.

Clear guidance for line managers on how to respond to requests for take-up of flexible or new ways of working.

Developing the management skills of line managers responsible for delivering flexible working options and managing teams working in new ways, through for example training, development and 360 degree feedback.

Workshops or development programmes for all staff to encourage them to change their own attitudes and behaviours, be supportive of others working different patterns and to help them identify solutions to their own work-life balance issues.

Support and guidance for employees taking up flexible working options, for example to deal with issues such as working from home or job sharing effectively or managing workloads. Support networks for staff were also suggested, for example for those working part-time or reduced hours to share experiences and discuss solutions.

Monitor performance, both individual performance in relation to their own work-life balance and the organisation's performance in relation to the take-up of the work-life balance initiatives.

Change the organisational culture, so that flexible working options become more accepted as the norm, through, for example, values champions or role models, recruitment of new staff who share the espoused values of the organisation and encouragement of staff to take responsibility for identifying solutions to their own issues.

Challenge working practices which unnecessarily increase individual workloads such as email-sending practices, scheduling, management and size of meetings, copying of paperwork and prioritisation of work.

A greater role for the HR function to take a more proactive role in, for example:

- approving decisions about flexible working and monitoring actions of line managers
- publicising the range of flexible working practices which are possible and acceptable
- monitoring the level of demand

- maintaining a list of people who want to job share
- have more influence over whether jobs are advertised as open to those working part-time or some other flexible pattern.

A grievance procedure or a help line available for when the system fails, for example if staff believe they have been treated unfairly by their line manager.

Various guidelines, standards and frameworks have been developed which aim to support and develop organisations' work-life balance policies and practices. These include The Industrial Society *'Work Life Manual'*, the TUC guide to work-life balance (*'Changing Times Guide'*) and *'The Work-life Balance Standard'* (WLBTC Ltd). They contain similar recommendations to those listed above, such as development of strategy and values, involving staff and customers, communication, changing cultures and attitudes and developing line managers.

7.5 Conclusion

This study was purposely conducted within organisations which have been identified as leading the field in the area of work-life balance. Clearly there were pockets of good practice occurring, and benefits were being reaped. However, it is not all plain sailing and, if these organisations are experiencing difficulties in successfully implementing work-life balance initiatives throughout their organisation, it is likely other employers will too. Demographic changes, business imperatives and public policy will continue to mean work-life balance and flexible working practices remain high on employers' agendas, even in times of an economic downturn. Therefore it is important the issues identified in this report are taken seriously.

We identified some specific difficulties and obstacles, most of which relate to the huge cultural shifts that work-life balance initiatives require in most organisations. We also suggested some of the issues which give rise to these obstacles, such as organisations continuing to value long hours or input more than output and the quality of an individual's contribution. None of the issues raised here is new. They have been reported and discussed in relation to part-time working, in relation to women's work, and more latterly in relation to 'managing a diverse

workforce'. They ignite some difficult debates about work and the employment relationship.

The future success of work-life balance initiatives is inextricably bound up with the future of these debates. It also depends on the specific practical problems we observed being addressed. Specificity will be key (specifying who might benefit and under what circumstances), as will an energetic commitment at all levels to the overarching work-life balance principle.

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